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# PeopleSoft Enterprise Integrated FieldService 9 PeopleBook

**August 2006**

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PeopleSoft Enterprise Integrated FieldService 9 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. |
| *Italics* | 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.<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |
| " " (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( | ). |

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

# Visual Cues

PeopleBooks contain the following visual cues.

## Notes

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

# PeopleSoft Integrated FieldService Preface

This preface discusses:

• PeopleSoft CRM application fundamentals.

• PeopleSoft CRM automation and configuration tools.

• PeopleSoft CRM services foundation.

• PeopleSoft CRM business object management.

• PeopleSoft CRM product and item management.

• PeopleTools PeopleBooks.

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

## PeopleSoft CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains these parts:

• CRM Multi-Product Foundation

This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

• Workforce Management

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

• Interactions and 360-Degree Views

This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

• Self-Service for Customers

This part discusses how to set up, administer, and use self-service applications for customers and workers.

• Relationship Management

This part discusses how system users manage their contacts and tasks.

• Entitlement Management

This part discusses setting up agreements and warranties.

• SmartViews

This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Getting Started"

# PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to the application PeopleBook.

There are five parts to the *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*:

- Correspondence Management

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools

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

- Configuration Tools

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

- Knowledge Management

  This part discusses the setup of Natural Language Processing (NLP) and Verity search.

- Business Process Management

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.

  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.

  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.

  - The setup and execution of business projects.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Getting Started"

# PeopleSoft CRM Services Foundation

The *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Integrated FieldService, PeopleSoft Order Capture, and the PeopleSoft call center applications (PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*:

- Solution management

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

- Transaction Billing Processor Integration

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

- Environmental Systems Research Institute (ESRI) integration

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

### See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Getting Started"

# PeopleSoft CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data Management for Individual Business Objects

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations

  This part discusses how to integrate customer and worker data with other systems. *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*.

### See Also

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Getting Started"

# PeopleSoft Product and Item Management

The *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

## See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Getting Started"

# PeopleTools PeopleBooks

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

# Getting Started

**Chapter 1**
**Getting Started with PeopleSoft Integrated FieldService**

**Chapter 2**
**Navigating in PeopleSoft Integrated FieldService**

# Getting Started with PeopleSoft Integrated FieldService

This chapter discusses:

• PeopleSoft Integrated FieldService overview.

• PeopleSoft Integrated FieldService business processes.

• PeopleSoft Integrated FieldService integrations.

• PeopleSoft Integrated FieldService implementation.

## PeopleSoft Integrated FieldService Overview

PeopleSoft Integrated FieldService ensures total life cycle management of service requests for customers and technicians. PeopleSoft Integrated FieldService is a flexible service order and dispatch management solution that provides complete management of agreements, parts, time, and expenses. It provides functionality to systematically manage preventive maintenance programs, generate reports, and automatically schedule preventive maintenance service orders.

## PeopleSoft Integrated FieldService Business Processes

This diagram lists PeopleSoft Integrated FieldService business processes. We discuss these business processes in the business process chapters in this PeopleBook.
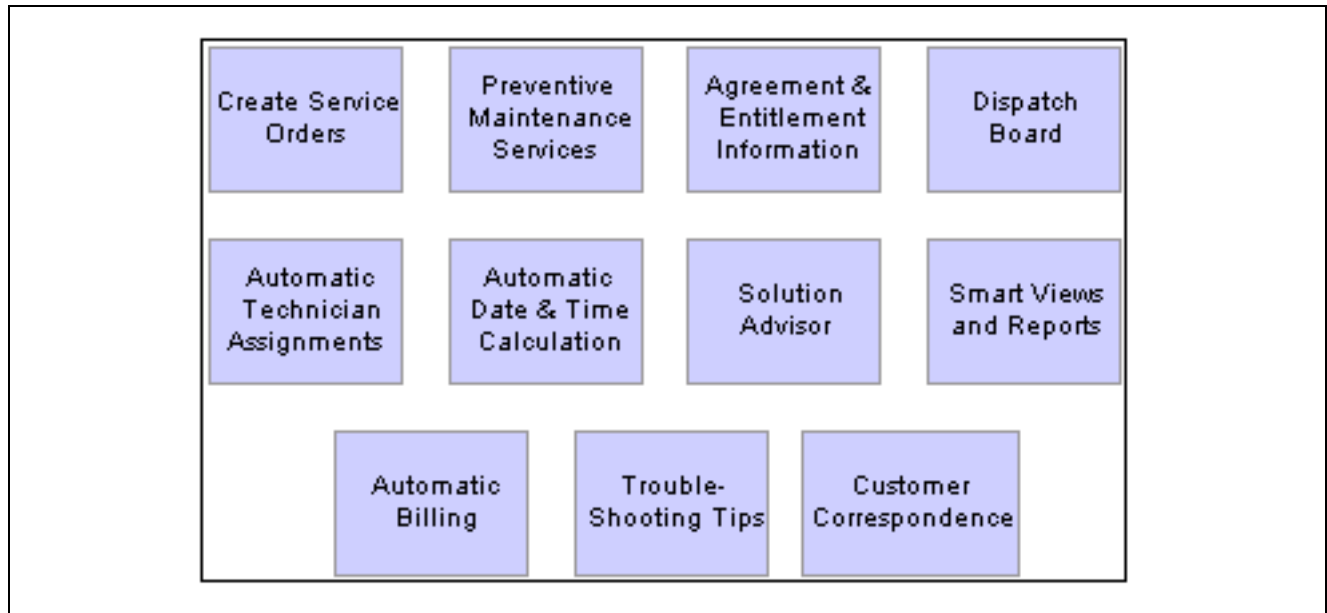
PeopleSoft Integrated FieldService business processes

Using PeopleSoft Integrated FieldService, you can:

• Create service orders to help field service technicians track their progress on each customer's service request and manage material, time, and expenses spent on performing the work.

• Automatically create service orders for preventive maintenance services.

• Automatically assign technicians to newly created service orders based on skills and availability.

• Automatically calculate the contractual start and end dates and times for newly created service orders and their associated activities.

• Obtain troubleshooting tips through Solution Advisor.

• Select and review agreement and entitlement information for customers from service orders.

• Manage task assignment for technicians and resolve schedule conflicts using the Dispatch Board.

• Analyze and monitor your field operations using standard and interactive reports.

• Send billing information to the Transaction Billing Processor.

**Note.** The Transaction Billing Processor enables PeopleSoft FieldService, PeopleSoft Support, and PeopleSoft Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture.

# PeopleSoft FieldService Integrations

PeopleSoft Integrated FieldService integrates with applications in the these PeopleSoft product lines:

• PeopleSoft Human Resources Management

By integrating with PeopleSoft Human Resources Management, you can collect information such as employee profiles, employee competencies, competency proficiency ratings, and holiday schedules to be used when the application assigns service tickets to best fit field service staff.

• PeopleSoft Supply Chain Management

If you want to perform material management and real-time item balance and availability checks in PeopleSoft Integrated FieldService, you must integrate the application with PeopleSoft Inventory and PeopleSoft Purchasing in the PeopleSoft Supply Chain Management product line (or third-party inventory and purchasing systems). An integration with PeopleSoft Inventory (or third-party inventory system) is required if you want to automatically update installed product statuses upon the receipt of shipping notices.

• PeopleSoft Contracts and PeopleSoft Billing (Transaction Billing Processor)

With PeopleSoft Integrated FieldService, you can bill for agreement fees, which can be on a recurring basis, and service order fees, which can be based on agreements and demand or warranty. From the Service Order page in PeopleSoft Integrated FieldService, the system can send agreement fee information and service order fees (including service, material, time, and expense fees) to the Transaction Billing Processor for billing and invoicing. You can also use the functionality within PeopleSoft Contracts to apply revenue to the appropriate accounts and use the rate-based contract line and as-incurred billing and revenue plan functionality in PeopleSoft Contract to generate agreement-based transactions.

If you purchased licenses for both PeopleSoft Integrated FieldService and PeopleSoft Support, a call center agent can create a service order from a case. Because the PeopleSoft Integrated FieldService and PeopleSoft Support applications reside in the same database, process flows can move smoothly from one application to another without the need for any integration-specific configuration. Using component interfaces for this type of cross-component flow ensures that all necessary data validation and other PeopleCode processes are triggered properly.

We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is on the PeopleSoft Customer Connection website.
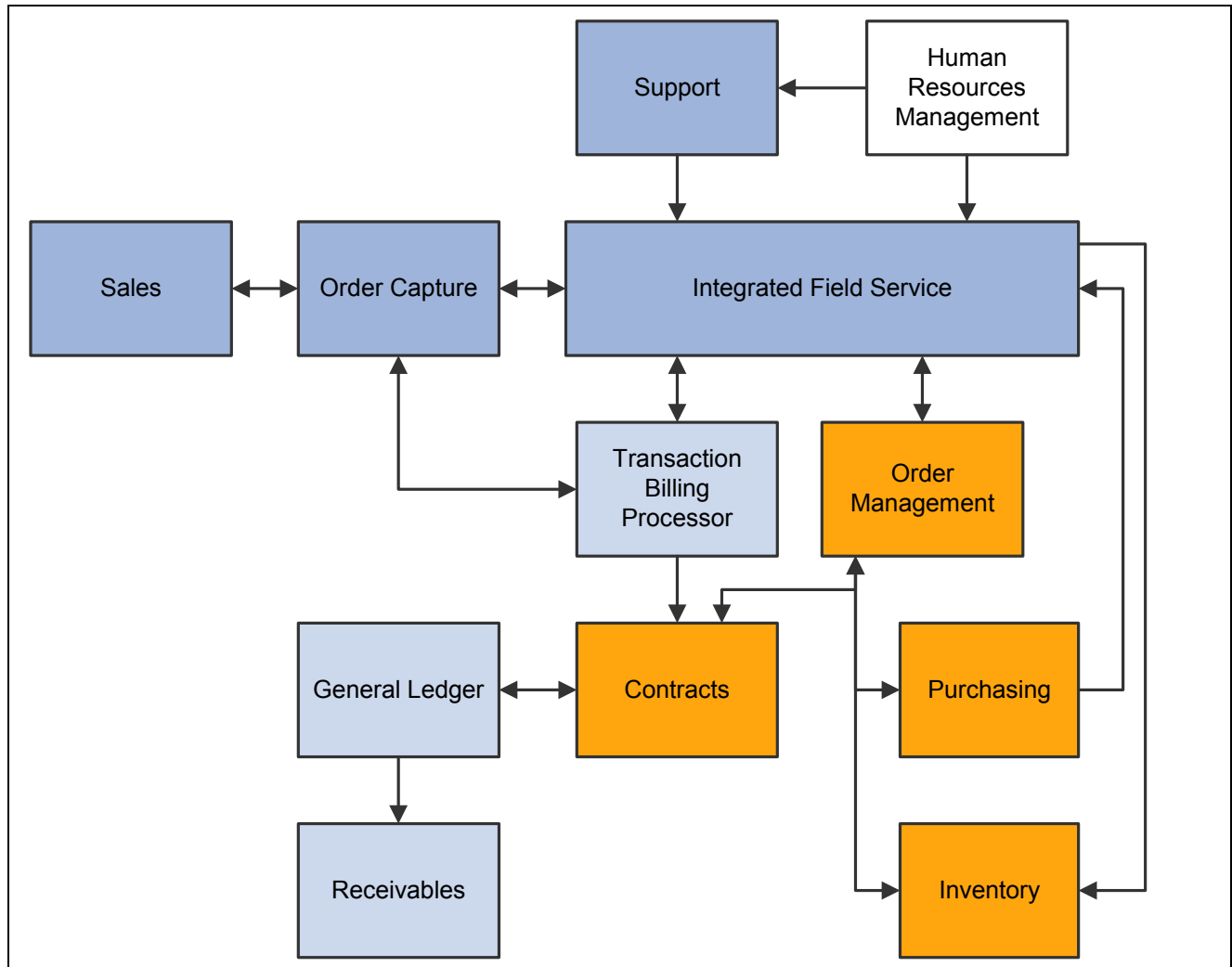
PeopleSoft Integrated FieldService integrations

### See Also

http://www.peoplesoft.com/corp/en/public_index.jsp

## PeopleSoft Integrated FieldService Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for the organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as links to the corresponding PeopleBook documentation.

PeopleSoft Integrated FieldService also provides component interfaces to help you load data from your existing system into PeopleSoft Integrated FieldService tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

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

| Component | Component Interface | Reference |
|---|---|---|
| Service Type<br><br>RF_SERVICE_TYPE | RF_SERVICE_TYPE_SCI | See Chapter 5, "Setting Up Services," Defining Service Types, page 27. |
| Service Activity Type<br><br>RF_SVC_ACT_TYPE | RF_SVC_ACT_TYPE_SCI | See Chapter 5, "Setting Up Services," Defining Service Activity Types, page 29. |
| Activity Code<br><br>RF_ACT_CODE | RF_ACT_CODE_SCI | See Chapter 5, "Setting Up Services," Defining Service Activities, page 30. |
| Failure Code<br><br>RF_FAILURE_CD | RF_FAILURE_CD_SCI | See Chapter 8, "Ordering and Receiving Materials," Defining Failure Codes, page 128. |
| Provider Group<br><br>RF_PROVIDER_GRP | RF_PROVIDER_GRP_SCI | See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members," Defining Provider Groups. |
| Provider Group Member<br><br>RF_GRP_MEMBER | RF_GRP_MEMBER_SCI | See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members," Defining Provider Group Members. |
| Tax Parameters<br><br>RF_TAX_PARAM | RF_TAX_PARAM | See *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Setting Up an Integration to the Transaction Billing Processor," Setting Up Sales and Use Tax for Third-Party Tax Vendors. |

## Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the prefaces of the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook,* and *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook,* with information on where to find the most up-to-date version of each.

## See Also

*PeopleSoft Enterprise Setup Manager for Customer Relationship Management 9 PeopleBook*

# CHAPTER 2

# Navigating in PeopleSoft Integrated FieldService

This chapter discusses how to navigate in PeopleSoft Integrated FieldService.

## Navigating in PeopleSoft Integrated FieldService

PeopleSoft Integrated FieldService provides custom navigation center pages that contain groupings of folders that support a specific business process, task, or user role.

**Note.** In addition to the PeopleSoft Integrated FieldService custom navigation center pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

### See Also

*Using PeopleSoft Applications*

## Pages Used to Navigate in PeopleSoft Integrated FieldService

This table lists the custom navigation pages that are used to navigate in PeopleSoft Integrated FieldService

**Note.** The role that is associated with a user's ID and password determines the pages they have access to. As such not everyone will have access to all of the information described in this table.

### FieldService Center

The FieldService Center custom navigation pages are geared to the person in the organization who is focused on managing service orders and service inventory.

| Page Name | Navigation | Usage |
|---|---|---|
| FieldService Center | Main Menu, FieldService Center | Access primary service order and service inventory menu options and activities |
| Customer | Click Customer on the FieldService Center page | Access the Consumer, Company, Agreements, and Installed Products pages. |
| Items | Click Items on the FieldService Center page | Access the Review Item Definition and Item Warranties pages. |

| Page Name | Navigation | Usage |
|---|---|---|
| My Calendar | Click My Calendar on the FieldService Center page | Access the My Monthly Calendar, My Daily Calendar, and My Worklist Items pages. |
| Reports | Click Reports on the FieldService Center page | Access the pages to run the dashboard analytics, utilization-rate analytics, service-order aging analytics, and these operational reports:<br><br>• Dispatch performance report<br><br>• Expense report by product<br><br>• Expense report by customer<br><br>• Mean time-to-repair report |
| Service Inventory | Click Service Inventory on the FieldService Center page | Access the Service Inventory page. |
| Service Order | Click Service Order on the FieldService Center page | Access the Dispatch Board, My Service Orders, Add Service Order, Update Service Orders, and Review Preventive Maintenance pages. |
| Workforce | Click Workforce on the FieldService Center page | Access the Provider Groups and Provider Group Members pages. |

# PART 2

# Setup Data

**Chapter 3**
**Defining Business Units in PeopleSoft Integrated FieldService**

**Chapter 4**
**Understanding Inventory Storage Locations for Technicians**

**Chapter 5**
**Setting Up Services**

**Chapter 6**
**Working with Scheduled Preventive Maintenance**

# Defining Business Units in PeopleSoft Integrated FieldService

This chapter provides overviews of field service business units and field service configuration templates and discusses how to:

• Define field service business units.

• Define configuration templates for service orders.

## Understanding FieldService Business Units

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), field service business units track service orders that are created by each field service organization. To implement PeopleSoft Integrated FieldService, you must map the field service organization to field service business units.

The field service business unit ID also serves as a reference key when integrating with PeopleSoft Purchasing and PeopleSoft Inventory. If you're integrating with PeopleSoft Purchasing to create requisitions for truck stock, you must define each field service business unit as a valid source of requisitions in PeopleSoft Supply Chain Management (PeopleSoft SCM). By using the Requisition Loader Defaults component in PeopleSoft SCM, you define each field service business unit as a loader business unit and establish processing defaults for requisitions that are staged by the field service business unit, including the purchasing business unit in PeopleSoft Purchasing that processes the requisitions.

When defining procurement options in PeopleSoft SCM, you can associate the field service business unit with an appropriate distribution network on the Ship To Locations page. Sourcing processes in PeopleSoft Purchasing can be configured to check available quantity first in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, an interunit transfer is created to fulfill the requisition.

This diagram illustrates how a field service business unit is used in both PeopleSoft CRM and the inventory and purchasing system:

**PeopleSoft FieldService**

**PeopleSoft Inventory and PeopleSoft Purchasing or Third-Party Inventory and Purchasing Systems**

Purchasing Business Unit Purchase Order

Ship to location entered in FieldService

Order Material in Field Service Business Unit

Purchase Order Requisition EIP

Requisition Loader Defaults Requesting Loader Business Unit= FieldService Business Unit

PO Sourcing Quantity Available in Distribution Network?

No

Yes

Inventory Business Unit Interunit Transfer Order

Ship to location entered in FieldService

**Distribution Network**

Inventory Business Unit

Inventory Business Unit

Inventory Business Unit

Inventory Business Unit

Inventory Business Unit

Order flow from PeopleSoft Integrated FieldService to the inventory and purchasing system

For integration purposes, business unit definition records must be synchronized across all systems. Business unit definitions created in PeopleSoft CRM must be available in PeopleSoft Purchasing, and inventory business unit definitions must be available in PeopleSoft CRM. To synchronize business unit records across the organization, use the Business Unit enterprise integration point (EIP).

**Note.** There is only a one-way synchronization from PeopleSoft Financials and Supply Chain Management (PeopleSoft FIN/SCM) to PeopleSoft CRM. The business units that you create within PeopleSoft CRM are not automatically synchronized and have to be entered manually in the PeopleSoft FIN/SCM database

### See Also

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

*PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

*PeopleSoft Enterprise Purchasing PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

# Understanding Field Service Configuration Templates

Configuration templates provide PeopleSoft CRM administrators a simple way to configure core components to be used by industry solutions. Through the use of templates, you can easily manipulate the appearance and behavior of a component by enabling and disabling certain features that are available on the corresponding template. In PeopleSoft Integrated FieldService, the Service Order component is made configurable by using configuration templates.

**Note.** Configuration templates are different from display templates, which are used by PeopleSoft Support. PeopleSoft Enterprise FieldService does not use the display templates.

### Service Order Configuration by Using Configuration Templates

Configuring service orders by using templates is a simple, two-step process. To configure service orders:

1.  Define a configuration template.

    In the configuration template, you indicate which product-related information (if any) must appear and be prompted for in service orders. In addition, you can configure the Service Order component to hide entitlement and billing details and enable anonymous user and incident address usage for your industry-specific needs. You can also configure whether to display expenses and priority (at the activity level) and turn off approvals.

2.  Associate the configuration template with a business unit.

    Specify, at the business unit level, the template that is used to control the appearance and behavior of service orders for the business unit.

    **Note.** Every field service business unit must be associated with one configuration template. If you have multiple business units in the organization with various service order requirements, create multiple configuration templates with different settings to accommodate all of your business needs.

When you create or open a service order after the setup is completed, the system applies to the service order the configuration template that is selected for that service order's business unit. The service order appears according to what is in the configuration template.

PeopleSoft Integrated FieldService delivers configuration templates for service order configuration: *CORE* for non-industry solutions, *GOV* for PeopleSoft CRM for Government, and *FIN* for the Financial Services and Insurance industries. You can make changes to existing templates as needed or create additional ones. Modifications that are made to the service order appear as a result of the configuration template and are reflected in service orders that are accessed through the My Service Order component.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Understanding Configuration Tools"

# Defining FieldService Business Units

To define FieldService business units, use the Field Service Business Unit (RF_BUS_UNIT) component.

This section discusses how to

• Define FieldService business units.

• Define billing options.

.

## Page Used to Define FieldService Business Units

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| FieldService Definition | BUS_UNIT_RF1 | Set Up CRM, Business Unit Related, FieldService Definition, Business Unit. | Define field service business units that correspond to field service organizations. |
| Billing Options | RF_BU_BILL_OPTIONS | Set Up CRM, Business Unit Related, FieldService Definition, Billing Options. | Define billing options for a field service business unit. |

## Defining FieldService Business Units

Access the FieldService Definition page:

FieldService Definition page

**Note.** If you use more than one PeopleSoft application and define the same business units across applications, ensure that you use the same name for business units that are designed to share the same setID. For best performance, business unit IDs should be exactly five alphanumeric characters.

| | |
|---|---|
| **Default SetID** | Enter the setID that determines the preliminary tableset sharing setup. The system displays this field when you create a business unit. The setID that you select here determines the setIDs that are assigned to each record group for the new business unit. The setID that is assigned to a record group determines the tableset that provides values for the business unit. If you enter an existing setID, the system copies the set control definition to the new business unit. |
| **Template** | Enter the configuration template to be used by this business unit. When creating or modifying service orders, the system displays or hides fields and buttons based on the configuration that is set up in the selected template. |
| **Status** | Select whether the facility that is represented by the business unit is open or closed. No transactions can be processed for a closed business unit. By default, the status is set to *Closed* when adding a new business unit. |
| **Currency** | Select the currency code that specifies the currency that you use for a monetary transaction with this business unit. |
| **Create BU** (create business unit) | Click to establish the setID controls for the field service business unit based on the default setID that you specified. This button is available only when |

<table>
<tr>
<td></td>
<td>you add a new business unit. You also must click this button to enable the check boxes that appear on the page.</td>
</tr>
<tr>
<td>**Rate Type**</td>
<td>Select the exchange rate type that you want to use to calculate monetary transaction amounts for the currency.

The system uses a default rate type of *Current Rate* when you create a new business unit. This field appears by default from the Exchange Rate Type field that you set on the General Options page in the Installation Options component. You can, however, override the setting by selecting another value.

**Note.** You can change the value in this field only after you create the business unit by clicking the Create BU button.</td>
</tr>
<tr>
<td>**Service Level**</td>
<td>Select the service level that you want to use for the business unit. This is a required field that prompts on all service levels that have been defined for the setID. You can enter a service level only after clicking the Create BU button, which creates the business unit.</td>
</tr>
</table>

## Options

Use this group box to control how PeopleSoft Integrated FieldService behaves by activating or deactivating the application features at the business unit level.

**Note.** You can only enter information in this section after clicking the Create BU button.

<table>
<tr>
<td>**Allow Service Order Creation for Site without a Customer**</td>
<td>Select to enable users to create service orders by entering site information without specifying a customer or contact. By default, this option is disabled.</td>
</tr>
<tr>
<td>**Calculate Date/Time**</td>
<td>Select to enable the system to automatically calculate planned start and end dates and times for service orders activities based on the entitlements that are associated with the agreement, warranty, or service that is selected on the service order. By default, this option is disabled.</td>
</tr>
<tr>
<td>**Allow Preventive Maintenance**</td>
<td>Select to enable the system to automatically generate service orders for installed products that are entitled to scheduled preventive maintenance. By default, this option is disabled.</td>
</tr>
<tr>
<td>**Automatic Receiving**</td>
<td>Indicates whether orders that are placed by using the Manage Material page can be received automatically when material usage is recorded or if technicians must record receipt of the order shipment before they can record material usage. This setting applies to all material requisitions that are created for the field service business unit.</td>
</tr>
</table>

## Service Order Assignment

Use this group box to control how PeopleSoft Integrated FieldService assigns provider groups and technicians to service orders for the business unit

**Note.** You can only enter information in this section after clicking the Create BU button.

<table>
<tr>
<td>**Automatic Assignment at Save**</td>
<td>Select to enable the system to automatically assign best fit provider groups and technicians to service orders in this business unit. When the feature is enabled, the system doesn't perform automatic assignment if the service</td>
</tr>
</table>

order already has a provider group and group member assigned to it at save time. If the assignment of provider groups or group members already exists (either populated from the selected service or agreement of the service order, or as a result of a manual assignment), selecting this option does not overwrite current values.

**Candidate must be available**

Select if you want the assignment engine to consider only provider groups or group members that are available (during the time the service is performed) during automatic assignment. No automatic assignment is performed if this check box is selected and there are no provider groups or group members available.

Clear this check box if provider groups and group members do not need to be available at the time that is requested on the service order to be considered for the automatic assignment.

**Note.** Before selecting the Candidate must be available check box, you must select Automatic Assignment at save.

### See Also

Chapter 8, "Ordering and Receiving Materials," page 109

Chapter 6, "Working with Scheduled Preventive Maintenance," page 47

Chapter 7, "Creating and Managing Service Orders," Setting Up Automatic Calculation of Dates and Times for Service Orders, page 72

Chapter 7, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments, page 78

*Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

## Defining Billing Options

Access the Billing Options page.

Instructions on completing the Billing Options page are included in the *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook.*

**Note.** This page is only available after clicking the Create BU button.

### See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Setting Up an Integration to the Transaction Billing Processor," Setting Up Billing Options for PeopleSoft Integrated FieldService

# Defining Configuration Templates for Service Orders

To define configuration templates for service orders, use the Field Service Industry (RF_INDUSTRY) component.
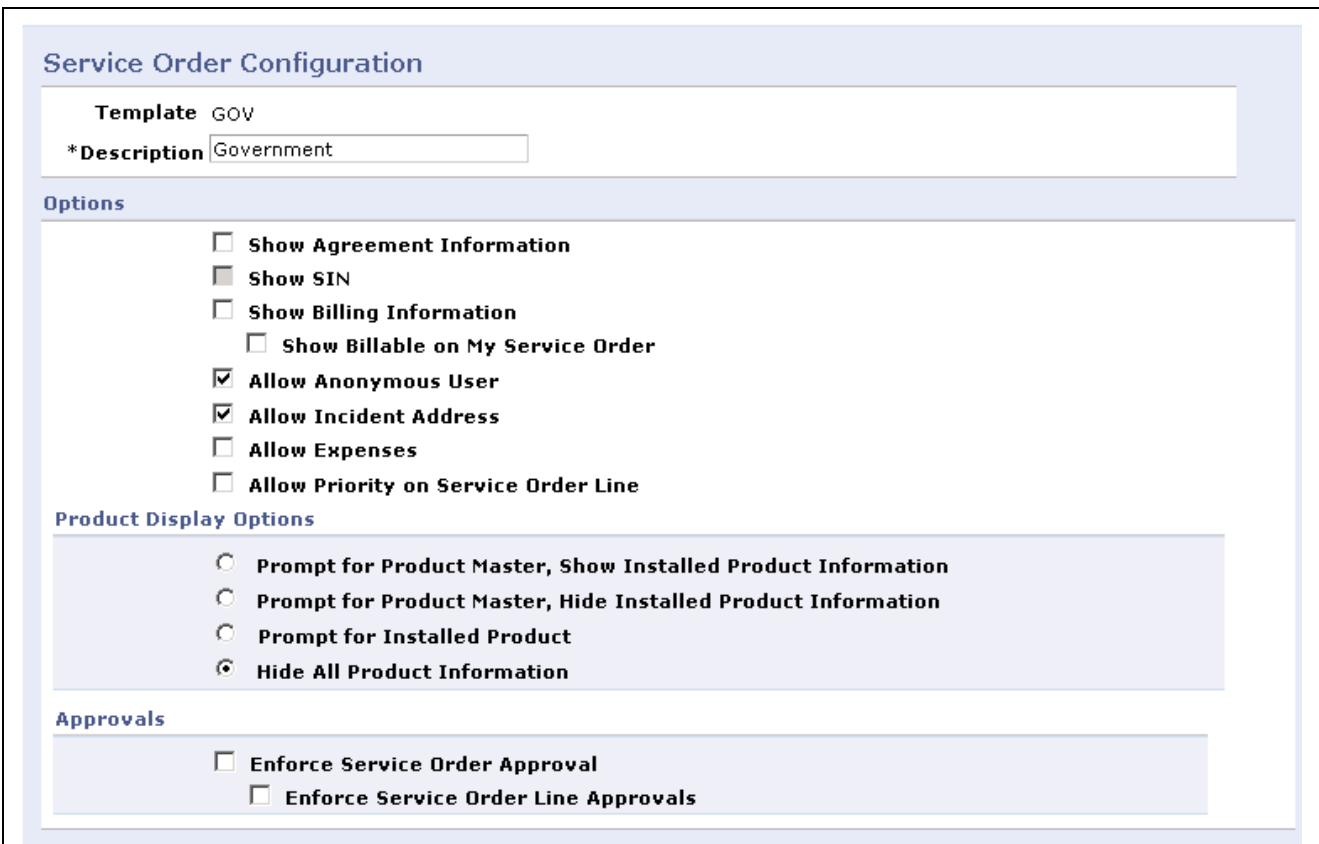
This section discusses how to define configuration templates for service orders.

## Page Used to Define Configuration Templates for Service Orders

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Service Order Configuration | RF_INDUSTRY | Set Up CRM, Product Related, FieldService, Service Order Configuration, Service Order Configuration | Define configuration templates to dictate how service orders appear in the Service Order and My Service Order components. |

## Defining Configuration Templates for Service Orders

Access the Service Order Configuration page.



Service Order Configuration page

**Note.** If you have installed both PeopleSoft Support and FieldService, it is highly recommended that the product display options that you select here are consistent within each system.

### Options

These check boxes are selected when you create a new configuration template.

**Show Agreement Information**  Clear to hide the agreement and entitlement information in the Service Order and My Service Order components. When this check box is cleared, the system hides the Select Agreement/Warranty link on the Service Order and the Entitlement information in the Service Order and My Service Order components.

| | |
|---|---|
| **Show SIN** (show site identification number) | Clear to hide the SIN field in the Customer Information group box on the Service Order page. |
| | The Show SIN check box is unavailable for editing if Show Agreement Information is disabled. The check box is automatically selected if Show Agreement Information is selected. |
| **Show Billing Information** | Clear to hide the Billable check box and the Billing tab on the Service Order page. |
| **Show Billable on My Service Order** | Clear to hide the Billable check box on the My Service Order page. |
| **Allow Anonymous User** | Select to allow the use of an anonymous user and to display the Anonymous Caller check box on the Service Order page. |
| | The anonymous user feature was first introduced in PeopleSoft CRM for Government. You can designate a service order for an anonymous caller by selecting the Anonymous Caller check box in the Customer Information group box. The system then populates the Customer field with the value that the administrator has specified for an anonymous user. |
| **Allow Incident Address** | Select to allow the use of an incident address and to display the Incident Address group box on the Service Order and My Service Order page. This feature originates from PeopleSoft CRM for Government; it enables you to enter an address (other than the customer address) that is specific to the incident that is reported in the service order and to enter location details as applicable. |
| **Allow Expenses** | Select to display the Expense group box on both the Service Order and My Service Order pages. |
| **Allow Priority on Service Order Line** | Select to display the Priority field for each activity on both the Service Order page and the My Service Order pages. |

## Product Display Options

These values control the display of product-related information on the service order that is accessed from both the Service Order and My Service Order components.

| | |
|---|---|
| **Prompt for Product Master, Show Installed Product Information** | Select to display all of these product-related fields and information: |
| | • The Product ID field and lookup button, the Transfer to Product button, and the product description. |
| | • The Serial Number field and lookup button and the Transfer to Installed Product button. |
| | • The Installed check box. |
| | • The View Hierarchy button on the toolbar. |
| | **Note.** If you select this option, the Product ID lookup button returns a list of all products. |
| **Prompt for Product Master, Hide Installed Product Information** | Select to display the Product ID field and lookup button, the Transfer to Product button, and the product description, while hiding the Serial Number field and lookup button, the Transfer to Installed Product button, and the View Hierarchy button. |

|  | **Note.** If you select this option, the Product ID lookup button returns a list of all products. |
| --- | --- |
| **Prompt for Installed Product** | Select to display the Product ID field and lookup button, the Transfer to Product button, the product description, the Serial Number field and lookup button, the Transfer to Installed Product button, and the View Hierarchy button. |
|  | **Note.** If you select this option, the Product ID lookup button returns only those products that are installed for the particular customer that is displayed on the page. |
| **Hide All Product Information** | Select to hide all product-related fields on the Service Order page, including the Product ID field and lookup button, the Transfer to Product button, the product description, the Serial Number field and lookup button, the Transfer to Installed Product button, and the Installed check box. The View Hierarchy button on the toolbar does not appear when this option is selected. |

## Approvals

These values control the display of approval options on the Service Order page for both the entire order and for each activity.

**Note.** Approval information does not appear on the My Service Order page. The Status field at the activity level, however, indicates whether the activity needs approval.

| **Enforce Service Order Approval** | Select to display the Approval Information group box on the Service Order page. |
| --- | --- |
| **Enforce Service Order Line Approvals** | Select to display the Approval Required and Approval Status fields on the Activity tab of the Service Order page. |

# CHAPTER 4

# Understanding Inventory Storage Locations for Technicians

This chapter discusses truck stock storage locations.

## Truck Stock Storage Locations

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you associate field service technicians in the workforce with storage locations in your inventory system by using the Storage Locations page of the Worker component.

You record the manual receipt of materials in Order Materials and record automatic receipts, usage, and removal of materials on the Time Material Expense page of the service order.

PeopleSoft CRM publishes transaction messages to update the storage locations that are associated with the technician reporting material usage for the service order activity. From the Service Order component, you can view stock balances by item.

To support this functionality, you must associate each technician in the workforce with two storage locations in your inventory system—one location for good stock that can be used to complete work on a service order line and another location for defective stock that was removed from customer sites. The stock that is removed from a customer site may not necessarily be defective. Typically, however, stock that is removed from a customer site must undergo inspection processing before it can be included in the available stock stores.

Before you can associate technicians with truck stock storage locations in PeopleSoft CRM, an inventory business unit and its material storage locations must be defined in PeopleSoft Inventory or a third-party inventory system.

If you are integrating with PeopleSoft Inventory, define an inventory business unit to track only truck stock storage locations. The records of the business units in the inventory system that represent the field service trucks must also be available in PeopleSoft CRM. Activate the Business Unit enterprise integration point (EIP) to automatically insert business units that are defined in the inventory system in the BUSINESS_UNIT_FS table in PeopleSoft CRM. This enables you to reference the appropriate inventory business unit for the technician's storage locations on the Storage Location page.

**Note.** When PeopleSoft CRM is integrated with PeopleSoft Supply Chain Management, the BUSINESS_UNIT_FS table in PeopleSoft CRM contains all business units that are defined in PeopleSoft Supply Chain Management, including all inventory business units that are defined in PeopleSoft Inventory. On the Storage Location page, select the appropriate inventory business unit.

This diagram shows how the good and defective storage locations are manually defined in two systems:
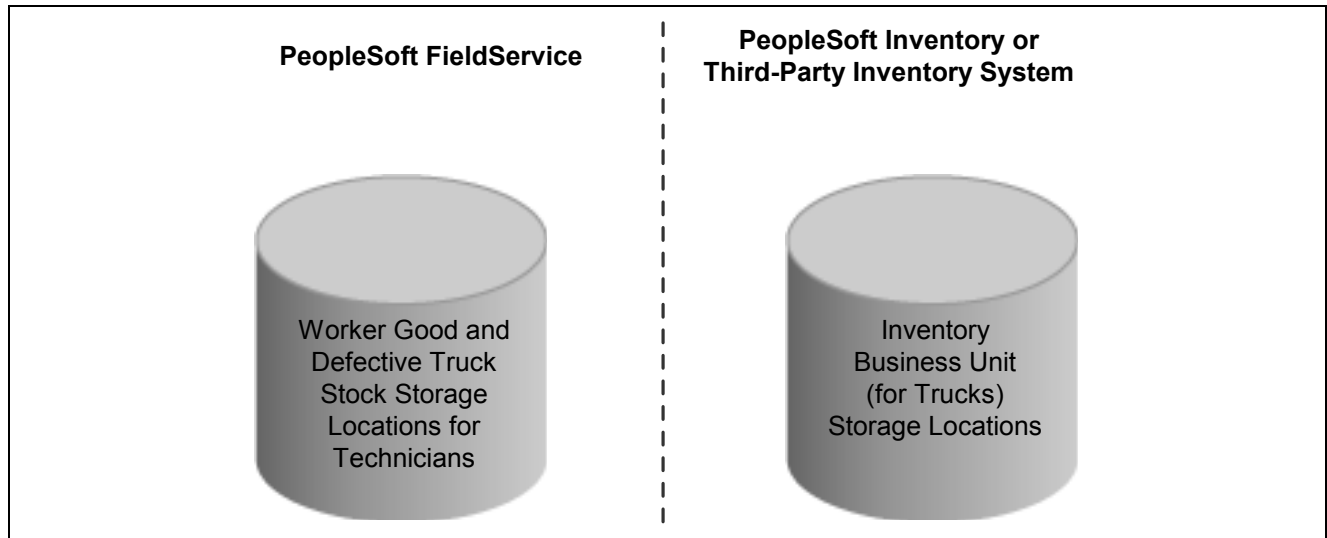
Defining truck storage locations for technicians in PeopleSoft CRM and Inventory (or another third-party inventory) systems

In order for material movement transactions that are initiated from the Time Material Expense page within the service order to be successfully recorded in the inventory system, the truck stock storage location (good or defective) that is defined for any field service technician (including an inventory business unit, a storage area, and up to four storage levels) must correspond to a valid storage location that is defined for that specific inventory business unit in the inventory system.

Your business processes dictate how to handle material in a technician's defective storage location. Typically, this stock is transferred to an inspection storage location within a distribution center, where a decision is made to scrap, recycle, repair, or restock the item in your inventory stores.

## See Also

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers"

Chapter 8, "Ordering and Receiving Materials," page 109

Chapter 12, "Integrating with PeopleSoft Applications," page 161

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

# CHAPTER 5

# Setting Up Services

This chapter provides an overview of the service data model and discusses how to:

• Define service types.

• Define activities.

• Define services.

# Understanding the Service Data Model

In PeopleSoft Integrated FieldService, you create a service record for each service that the company offers (for example, preventive maintenance on air conditioners or dish washer repair). After defining the details of a service, you can associate the service with prices, add the service to an agreement line, and enter service orders to track customer requests for the service.

This diagram illustrates the component records of a service definition in PeopleSoft Integrated FieldService:
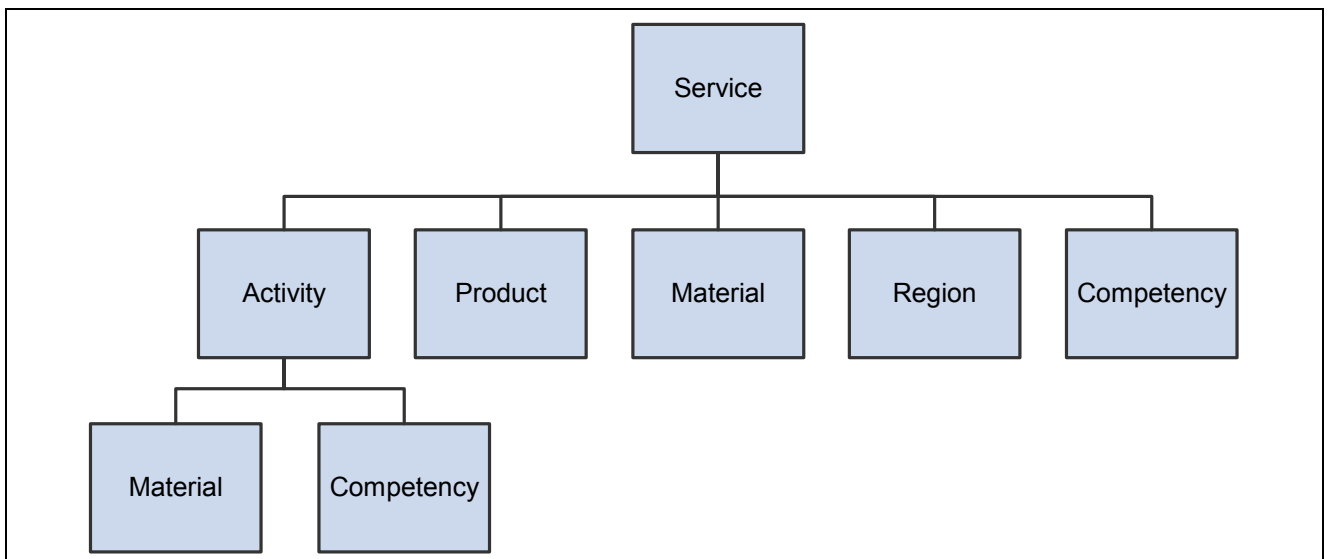


Service data model

When you create a service in the PeopleSoft Customer Relationship Management (PeopleSoft CRM) system, you can define:

• Service activities

Service activities define the tasks that are required to complete the service. When activities are defined and a service is requested on a service order, the system automatically creates service order activities for any activities that are defined for the service. Customer service representatives (CSRs) and technicians can modify or delete the service order activities.

**Note.** If you define service activities for a service, it is highly recommended that you also set up material and technician competency requirements for each activity. When you create a service order for a service that does not have any associated activity, the system populates the service order with material and competency information for the service. But when activities are defined for the service, the system populates the service order with material and competency information that is defined for the service activities. Therefore, if you don't specify the material and competency information at the service activity level, that information does not appear in service orders for that service.

• Products

You can define products that are covered by the service.

You can indicate that the service applies to all products in the system or you can define a subset of products for which the service is applicable. When you specify the service on an agreement line, the system verifies that only the products that are defined for the service can be listed as products under service on the agreement line. Similarly, when the service is requested on a service order, the system validates that only a product that is defined for a service can be specified on the service order.

• Materials

You can define quantities of the items that are required to perform the service or the service activity. If you define service activities, the system uses the service activity material information to populate the required material list that is associated with the service order line on the Order Materials page. The system also populates the Required Material page on the Service Order page and the My Service Order page. If there are no service activities, the system uses the material information at the service level to populate the required material list that is associated with the service order activities. From the Order Materials page, you can add additional items and order required materials.

• Regions

You can indicate that the service can be sold and deployed in all regions that are defined for the system, or you can define a subset of regions for which the service can be sold or deployed. When you specify the service on an agreement line, the system verifies that for agreements of scope "Site," the system matches the region of each agreement line site with the regions listed for that service and that for agreements of scope "Contact," the system matches the region of each agreement contact with the regions listed for the service (on each agreement line).

**Note.** In both cases, you must select the saleable flag for that region.

Similarly, when the service is requested on a service order, the system validates that only the region that is derived from the customer information on the service order is defined as a deployable region for the service.

• Competencies

You can specify a list of competencies and associate a minimum proficiency level that technicians or provider groups must have to be qualified to perform the service. The system uses the information for assigning service order activities. You can specify the minimum competency at the service level or at the service activity level if activities are defined. When you click the Suggest Provider Group or Suggest Group Member link on the Service Order page, the system calculates a lower fit score for any provider group or technician who does not meet the competency level that is specified for the service activity or service.

**See Also**

Chapter 8, "Ordering and Receiving Materials," page 109

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Setting Up Products"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up Regions

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Managing Workforce Competencies"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches"

# Defining Service Types

To define service types, use the Service Type (RF_SERVICE_TYPE) component. To load data into the tables for this component, you can also use the RF_SERVICE_TYPE_SCI component interface.

This section provides an overview of service type definitions and discusses how to define service types.

**Note.** Service Types are required when creating new services.

## Understanding Service Type Definitions

You can create service types to categorize, for example, delivery services, installation services, repair services, and so forth. Use the Service Types component to specify which groups of services are eligible for the preventive maintenance functionality. After defining a service type, you can categorize services by referencing the service type on services. You can also choose to develop custom reports based on service types.

## Page Used to Define Service Types

| Page Name | Object Name | Navigation | Usage |
|-----------|-------------|------------|-------|
| Service Types | RF_SERVICE_TYPE | Set Up CRM, Product Related, FieldService, Service Types | Establish codes that can be used to categorize services and indicate which service types are eligible for preventive maintenance. |

## Defining Service Types

Access the Service Types page.

Service Types page

## Service Types

Lists the service types that are defined for the specified setID.

| Type Code | Enter a code to identify the service in the system. You can use up to eight alphanumeric characters. |
|---|---|
| **Description** and **Short Description** | Enter the long and short descriptions for the service type. When you reference a service type on a service, the value that is entered for short description appears on the Service page. |
| **Preventive Maintenance** | Select to indicate that services that belong to this service type are eligible for preventive maintenance functionality in PeopleSoft Integrated FieldService. |
| | The system issues a warning if you clear the Preventive Maintenance check box for service types (namely to change service types back to a regular, non-preventive maintenance kind) under which services are already defined. You can then decide whether to let the system automatically delete all preventive maintenance-related information from the associated services or leave these service records intact for manual update in the future. |
| **VAT Defaults** (value-added tax defaults) | Click to access the VAT Defaults Setup page, which is a common page used to set up VAT defaulting for all PeopleSoft applications that process VAT transactions. On this page, you can define VAT defaults for service groups, per VAT registration country and state. The VAT defaults page is located in PeopleSoft Financials; click the links to transfer to this PeopleSoft Financials page. |
| | **Note.** The system displays VAT defaults and Service VAT Treatment defaults only when the integration to the Transaction Billing Processor is installed. In both cases, the saleable flag must be selected for that region in order to pass the test. |
| **Service VAT Treatment Defaults** (service value-added tax treatment defaults) | Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for service groups on this page for a supplier's (seller's) location country |

and state.  The VAT Treatment Drivers setup page is located in PeopleSoft Financials.

**Note.** The VAT Defaults Setup and Service VAT Treatment Drivers Setup pages are described in detail in the *PeopleSoft Enterprise Global Options and Reports PeopleBook, "Working with Value Added Taxes (VAT)".*

### See Also

*PeopleSoft Enterprise Global Options and Reports PeopleBook, "Working with Value Added Taxes (VAT)"*

# Defining Activities

To define activities, use the Service Activity Type (RF_SVC_ACT_TYPE) and Activity Code (RF_ACT_CODE) components.  To load data into the tables for these components, you can also use the RF_SVC_ACT_TYPE_SCI and RF_ACT_CODE_SCI component interfaces.

This section discusses how to define:

• Service activity types.

• Service activities.

## Pages Used to Define Activities

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Activity Types | RF_SVC_ACT_TYPE | Set Up CRM, Product Related, FieldService, Activity Types, Activity Types | Establish codes that can be used to categorize service activities. |
| Activity Code | RF_ACT_CODE | Set Up CRM, Product Related, FieldService, Activity Codes, Activity Code | Define the activities that comprise the defined services.  The values that you define on this page are used on the Service page of the service order. |

## Defining Service Activity Types

Access the Activity Types page.

Activity Types page

Similar to service type codes, service activity type codes reference the general category to which a service activity belongs. For example, an electric appliance company might define activity types such as refrigerator repair and refrigerator preventive maintenance for its refrigerator products.

**Type Code**              Enter a code to identify the activity type in the system. You can use up to eight alphanumeric characters.

When an activity type is selected for an activity code, both the type code and short description appear on the Activity Code page.

# Defining Service Activities

Access the Activity Code page.

Activity Code page

Defining services as a series of default activity steps enables you to manage technician competency and material requirements for each step of the service. It also enables the CSR or technician to tailor a service to the needs of the customer by adding or deleting activities for the service on the service order. In addition, you can attach activity codes to multiple service definitions, which reduces data entry requirements.

Activity codes are keyed by setID. As you create a new activity code record, enter the setID under which it belongs and the activity code.

| | |
|---|---|
| **Activity Code** | Displays the code that you entered in add mode for the service activity. You can use up to eight alphanumeric characters. |
| **Status** | Select either *Active* or *Inactive* to indicate the status of the activity code. |
| **Description** | Enter a description of up to 80 alphanumeric characters. |
| | **Note.** Service activity descriptions appear on system prompts when users select service activities on the Service and Service Order components. Enter a description that will be meaningful to the people who use these components. |
| **Activity Type** | Enter the category of activity that the service activity represents. Activity types are established on the Activity Types page. Click the Transfer to Activity Type button to access the Activity Types page. |
| **Estimated Time** | Enter the estimated time, in hours, that is required to perform the activity. This is the default value for the estimated duration on service order activities for this activity. This information is also used in the auto-date calculation to calculate the planned dates and times. |
| **Number of Technicians** | Enter the number of technicians that are required to perform the activity. This is the default value for the number of technicians on service order activities for this activity. This field is for informational purposes only and does not force you to assign a specific number of technicians to the activity. |

**Approval Required**       Select to indicate that when the activity is specified for a service order line, the service order line must be manually approved before time, expense, and material management transactions can be entered.

If approval processing is not defined for the overall service, you can change the setting on the service order line to require approval processing. However, if approval processing is required for the service, it is also required on the service order line. You cannot change the approval setting on the service order line when the service specifies approval processing.

# Defining Services

To define services, use the Service (RF_SERVICE) component.

This section describes how to:

- Define service header information.
- Define service frequency.
- Define service entitlements.
- Enter service details.
- Define service frequency by product.
- Define service activities.
- Enter service notes.
- Associate branch scripts with services.

## Pages Used to Define Services

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Service | RF_SERVICE | Set Up CRM, Product Related, FieldService, Services, Service | Define service header information. |
| Service - Frequency of Service | RF_SERVICE_FREQ1 | Click the Frequency of Service link on the Service page. | Define how often a service should be performed. The system uses the information that you enter here to schedule preventive maintenance service orders. |
| Service - Entitlements | RF_SERVICE_ENT | Click the Select Entitlement link on the Service page. | Define the entitlements for any on-demand services. When agreement and warranty entitlements are not available, the system uses the service entitlements instead to calculate required start and end dates and times for service orders. |
| Service Details | RF_SERVICE_ATTRIB | Set Up CRM, Product Related, FieldService, Services, Service Details | Define materials, regions, products, and competencies that are associated with a service. |
| Service Product - Frequency of Service | RF_SVC_PRD_FREQ | Click the Frequency link in the Service Product Information group box on the Service Details page. | Define how often a service should be performed for a specific product. The system uses the information that you enter to schedule preventive maintenance service orders. |
| Service Activities | RF_SERVICE_ACT | Set Up CRM, Product Related, FieldService, Services, Service Activities | Define the activities that are required to perform the selected service. |
| Notes | RF_SERVICE_NOTE | Set Up CRM, Product Related, FieldService, Services, Notes | Add, view, and modify notes that are associated with the service or service activity definition. |
| Branch Script | RF_SVC_BSCRIPT | Set Up CRM, Product Related, FieldService, Services, Branch Script | Add branch scripts to the service definition. |

## Defining Service Header Information

Access the Service page.

Service page (1 of 2)



Service page (2 of 2)

The system displays on the toolbar the service-specific information, such as service number, type, and status. Click toolbar buttons to perform PeopleTools or application-specific actions.

## Service Information

| | |
|---|---|
| **Description** and **Short Description** | Enter a service description of up to 80 alphanumeric characters. |
| | **Note.** The short description appears on system prompts when users select a service in the Agreement and Service Order components. Enter a description that will be meaningful to the people who use these components. |
| **Status** | Select a status: |
| | *Active:* Select to make the service available in the system during the time period that is specified by the start and end dates. |

*Inactive:* Select to make the service unavailable in the system, regardless of the offer start and end dates. An inactive service does not appear on system prompts for service orders or agreements.

**Service Type**

Select a category of service. Service types are established on the Service Types page. Click the Transfer to Service Type button to access the Service Types page.

**Estimated Duration**

Enter the estimated number of hours that is required to perform the service. When you save the service, the system issues an error if this value is less than the sum of the estimated times that are defined for the associated activities.

**Start Date** and **End Date**

Enter the first and last dates that the service can be offered on agreements and on-demand service orders.

*Warning!* Be sure to enter an end date. If the end date is blank, the system assumes that the service is offered indefinitely.

**Replacement**

Select a service that is scheduled to replace this service when this service is no longer offered. When a replacement service is specified, the system sets the status of the original service to *Inactive,* which prevents the service from being selected on agreements and service orders.

**Number of Technicians**

Enter the number of technicians that is required to complete the service. The value can also be defined at the service activity level for service activities on the Activity Code page.

When you define this value at the service level, the system populates the associated service activities with the same value as the default if the number of technicians is not yet defined for those service activities.

When you create a service order for a service with activities, the system populates the corresponding service order line with the number of technicians that is defined for each service activity.

**Note.** The system issues a warning if you begin technician assignment on a service order but the actual number of assignment is less than required when you save the record.

**Approval Required**

Select to indicate that service orders that specify this service require approval by a designated person in your company. If approval is required at this level, no service order line can be approved until the service order is approved at the header level.

**Note.** You can also require approval for individual activities on a service order. However, the Approval Required check box on the service order header and the Approval Required check box on the service order activity are not associated with each other operationally.

## Preventive Maintenance

Use this group box to perform part of the setup that is required for the preventive maintenance functionality in PeopleSoft Integrated FieldService.

**Preventive Maintenance**          Indicates that preventive maintenance is available for the service. The system automatically selects this check box and makes it unavailable if the service type that is selected for this service is designated as the preventive maintenance type.

**Field Service Unit**              Select a field service business unit under which service orders that are created for preventive maintenance are categorized.

**Lead Time** and **Lead Time Interval**   Enter the number (lead time) of days, weeks, months, or years (lead time interval) in advance when a preventive maintenance service order must be generated before the service actually occurs.

**Frequency of Service**            Click to access the Service - Frequency of Service page, where you can define the frequency that is offered for this service. The system uses this information to schedule service orders for preventive maintenance.

## Classification

**Agreement**                       Select to offer the service to customers on agreements. If this check box is cleared, the service does not appear on system prompts for agreements. You can also select this check box on the service order. If Agreement is selected, the system checks to ensure that the service that you select on the service order has this option selected.

**On Demand**                       Select to offer the service to customers on demand. For a service order that is not covered by a warranty or an agreement, the system validates that the service is available on demand when the service order is saved.

**Warranty**                        Select to provide the service under warranty.

                                    When you select a warranty and service on a service order, at save time the system ensures that a warranty has been selected if the check box for the service selected on the service order has also been selected.

**Off Hours**                       Select to provide the service outside standard hours of operation. This field is for informational purposes.

**Select Entitlement**              Click to access the Service - Entitlements page, where you can define entitlements for the service. This link is applicable to on-demand services only; the system uses this information to calculate committed start and end dates and times for service orders when both agreement and warranty are not available.

## Default Assignment

If a service order is not covered by an agreement, or if the selected agreement does not have a default provider group or group member assigned, the system uses the values that you enter in the Default Assignment group box to populate the service order activities. You can override the default values if necessary at the service order activity level.

**Provider Group Name**             Enter the default provider group that you want to perform the service. Click the Transfer to Provider Group button to access the Provider Groups page.

**Group Member Name**               Enter the default group member (of the defined provider group) for performing this service at the customer's site. Click the Transfer to Group Member button to access the Provider Group Member page.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members"

Chapter 7, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments, page 78

# Defining Service Frequency

Access the Service - Frequency of Service page.



Service - Frequency of Service page

You can define the service frequency at the service or service product level. Values that are entered at the service level apply to all products if the Applicable to All Products check box is selected on the service record; otherwise, values are populated as defaults on the Service Product - Frequency of Service page for each product that is covered by this service. At the service product level, you can define different frequency settings that are specific to products.

| | |
|---|---|
| **Start Date** | Enter the beginning date of the period for which service frequency is defined. The default value is the offer start date that is defined on the Service page. |
| **End Date** | Enter the end date of the period for which service frequency is defined. A blank value indicates an unlimited frequency period. |
| **Start Time** | Enter the beginning time of the period for which service frequency is defined. The time zone that appears for this value represents the time zone of the database server. |

| End Time | Enter the end time of the period for which service frequency is defined. The time zone that appears for this value represents the time zone of the database server. |
|---|---|
| **Service Frequency Information** | Values are: |

*Days:* Define the duration of this frequency in number of days. For example, enter *30* to have the service performed every 30 days.

*Weeks:* Define the duration of this frequency in number of weeks and specify the day of the week on which to perform the service. For example, enter *2* and *Wednesday* to have the service performed every two weeks on Wednesday.

*Months:* Define the duration of this frequency in number of months and specify the day of the month on which the service should be scheduled. For example, enter *3* and *3* to have the service performed every three months on the third day of the month.

*Yearly:* Define the month and the day of the month to perform the service. For example, enter *January* and *1* to have the service performed on January 1 of every year.

# Defining Service Entitlements

Access the Service - Entitlements page.



Service - Entitlements page

| **Entitlement Plan Name** | Select an entitlement plan to populate the Entitlements grid for the first time. Entitlement plans are defined on the Entitlement Plan Setup page. |
|---|---|

**Note.** Entitlement plans are optional. You can enter entitlements manually on the Entitlements page.

You can add new entitlement activities and modify and delete existing entitlement activities in the grid. The list of entitlements is used for calculating the service order's committed start and end dates and times if agreement or warranty entitlements are not available.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook,* "Setting Up and Managing Agreements and Warranties," Defining Entitlements

# Entering Service Details

Access the Service Details page.



Service Details page (1 of 2)



Service Details page (2 of 2)

## Service Material Information

If no activities are defined for a service and if a service order is created, the system uses the service material information to populate the material list that is associated with the service order. From the Order Materials component, you add additional items and order the required materials.

---

**Note.** If you define service activities, define material information for the service activity on the Service Activities page.

---

| | |
|---|---|
| **Item ID** | Select the ID of the item that is used to perform the service. Before you can add an item to the service, you must first establish the item in the system tables by using the Item Master enterprise integration point (EIP) or the Item Definition component, and the item must be in active status. Click the Transfer to Item Definition button to access the Item Definition component. |
| **Required Quantity** | Enter the required amount of the item that the technician needs to perform the service. The system uses this value to populate the quantity that is required on the Order Materials component. |
| **UOM** (unit of measure) | Displays the standard unit of measure for the item quantity. |

## Service Competency Information

If no activities are defined for the service, the system uses service competency information to find the best technician to assign to the service order.

| | |
|---|---|
| **Description** | Select the description of the competency that is required to perform the service. Define competencies by accessing Set Up CRM, Common Definitions, Competencies, Competencies, Competencies. |
| **Minimum Level** | Select the minimum level of competency that the assigned technician must have to perform the service. The available options depend on the competency rating model that is defined for the selected competency. When searching for technicians to assign to service orders, the system calculates higher fit scores for those technicians who meet the minimum level of competency that is defined for the service. |
| **Weight** | Enter the relative importance of this competency. Each activity competency can have a value from *N/A* (not applicable) to *5,* where *5* represents the highest level of importance. A weight of *N/A* indicates that the competency is not applicable in the assignment search. |

## Service Region Information

| | |
|---|---|
| **Applicable to All Regions** | Select to perform the service for all regions. |
| **Applicable Regions** | Select if the service is limited to specific regions. You must enter region information in the Service Region Information grid if you chose this option. |
| **Description** | Select a region. Regions are established on the Region page. You can select active regions only. |
| **Saleable** | Select if the service is saleable in the region. When you select the service on an agreement, the system validates that the customer contact or customer sites listed on the agreement correspond to a saleable region. |
| **Deployable** | Select to provide the service in the region. When you select the service on a service order, the system validates that the customer or customer site corresponds to a deployable region. |

**Service Product Information**

**Applicable to All Products**     Select to perform the service for all products

**Applicable Products**     Select if the service is limited to specific products. You must enter product information in the Service Product Information grid if you select this option.

**Product ID**     Select the product to which the service applies. When you add a product to an agreement line or service order, the system validates that the product was defined for the service. Before you can add a product to the service, the product must first be established in the system tables by using the Product EIP or the Product Definition component. The product must have an active status, and the corresponding item must be defined as serviceable. Click the Transfer to Product button to access the Product Definition component.

**Item ID**     Displays the item ID that is associated with the product.

**Frequency**     Click to access the Service Product - Frequency of Service page, where you can view and modify the service frequency that is defined for the product.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Managing Workforce Competencies"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Setting Up Products"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up Regions

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches"

# Defining Service Frequency by Product

Access the Service Product - Frequency of Service page.

This page is almost identical to the Service - Frequency of Service page. The system populates the start date and time, end date and time, and frequency on this page with the service frequency information that is defined on the Service page. The Service Product - Frequency of Service page also enables you to override the frequency for specific products.

### See Also

# Defining Service Activities

Access the Service Activities page.

Service Activities (page 1 of 2)



Service Activities (page 2 of 2)

You can optionally describe a service as a series of activities. If you use activities, you can define product, competency, and other information by activity, instead of by service.

## Service Activity Information

| | |
|---|---|
| **Activity** | Select an activity. Activity codes are defined on the Activity Code page. When you select an activity code, the system populates the service activity with the information that is defined for the activity code. |
| **Step Number** | Enter a number to specify the order in which activities are performed for this service. If this is the second activity performed, for example, enter *2*. |
| | **Note.** This step number is used in autocalc to determine how to stagger the planned dates and times. |
| **Activity Type** | Displays the type of activity. Activity type codes are defined on the Activity Types page and are associated with activities on the Activity Code page. |
| **Number of Technicians** | Displays the number of technicians that is required to complete the service activity. The value is populated from the Activity Code page or, if it is not available on the Activity Code page, from the Service page. |

| | |
|---|---|
| **Estimated Duration** | Enter the number of hours that is required to perform the activity. The default value is defined on the Activity Code page. |
| **Approval Required** | Select to indicate that when the activity is specified for a service order line, the service order activity must be manually approved before time, expense, and material management transactions can be entered on the service order line. The default value is defined on the Activity Code page. |
| | If approval processing is not defined for the service, you can change the approval setting on the service order activity to require approval processing. However, if approval processing is required for the overall service, it is also required on the service order line. You cannot change the approval setting on the service order line when the service specifies approval processing. |

## Default Assignment

| | |
|---|---|
| **Provider Group Name** | Enter a default provider group for service order activities that request this activity. |
| **Group Member Name** | Enter a default provider group member for service order activities that request this activity. |

## Service Activity Material Information

When a service order line is created for this service activity, the system populates the required materials for the service order with the activity material information that is defined in this group box. Use the Order Materials component to add additional items and to order the required materials.

| | |
|---|---|
| **Item ID** | Select the ID of the item that is used to perform the service activity. The item must be established in the system by using the Item Master EIP or the Item Definition component, and the item must have an active status. |
| **Required Quantity** | Enter the amount of the item that the technician needs to perform the service activity. The system uses this value to populate the quantity that is required on the Order Materials page. |
| **UOM** (unit of measure) | Displays the standard unit of measure for the item quantity. |

## Service Activity Competency Information

The system uses this information to find the best technician to assign to the service order line. The system compares the group members' competencies with the competency at the activity level.

| | |
|---|---|
| **Description** | Enter the description of the competency that is required to perform the service activity. Define competencies by accessing Set Up CRM, Common Definitions, Competencies, Competencies, Competencies. |
| **Minimum Level** | Enter the minimum level of competency that the assigned technician must have to perform the service. The available options depend on the competency rating model that is defined for the selected competency. When searching for technicians to assign to service order activities, the system calculates higher fit scores for those technicians who meet or exceed the minimum level of competency that is defined for the activity. |
| **Weight** | Enter the relative importance of this competency. Each activity competency can have a value from *N/A* to *5,* where *5* represents the highest level of |

importance. A weight of *N/A* indicates that the competency is not applicable in the assignment search.

## See Also

Chapter 8, "Ordering and Receiving Materials," page 109

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Managing Workforce Competencies"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches"

# Entering Service Notes

Access the Notes page.



Notes page

If the page has at least one note, the summary view appears when you first access the Notes page. Click the link in the Subject and Details column to see the detailed view of that note.

Click the Add Note button to add a new note. If there are no notes entered for the service, enter the information that you want to add and then click the Apply Note button.

To add a note that is specific to a service activity, specify the activity code of the service activity in the Associated Activity field of the note.

---

**Note.** The start and end dates on the notes page are for informational purposes only and do not drive any processing. Activities are available only if they are tied to the service.

---

## See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments"

# Associating Branch Scripts with Services

Access the Branch Script page.



Branch Script page

## Branch Script Information

| | |
|---|---|
| **Script Name** and **Script Type** | Enter a branch script that you want to associate with the service. The system displays the script type after you make the selection. |
| | When you add a branch script to a service, the system populates service orders that are created for that service with the script. |

**CHAPTER 6**

# Working with Scheduled Preventive Maintenance

This chapter provides an overview of scheduled preventive maintenance and discusses how to:

• Set up scheduled preventive maintenance.

• Manage scheduled preventive maintenance.

## Understanding Scheduled Preventive Maintenance

This section lists common elements and discusses:

• Benefits of scheduled preventive maintenance.

• Preventive maintenance process flow.

### Common Elements Used in This Chapter

| | |
|---|---|
| **Start Date** and **Service Order Date** | The required start date of the preventive maintenance service order. The system calculates this value by adding the specified service frequency to the date on which the previous preventive maintenance service order was closed. |
| | The system also takes the service level into account. For example, if the customer offers service Monday through Friday only, the start date would not be on a Saturday or Sunday. |
| **Creation Date** | The service order creation date (when the preventive maintenance service order will be generated by the Application Engine process). |

### Benefits of Scheduled Preventive Maintenance

Scheduled preventive maintenance is a collection of services that are performed regularly on products to prevent unexpected product failure. These preplanned services, such as running performance checks and tune-ups or checking and replacing worn parts, help sustain the performance and extend the longevity of products. The result is a reduction in ownership costs to both service providers and customers.

The preventive maintenance feature in PeopleSoft Integrated FieldService enables you to:

• Set up the system at the business unit level to automatically generate service orders for preventive maintenance services on installed products that are covered by an agreement.

These preventive maintenance service orders are processed the same way as other service orders (from assigning a technician to processing service activities and completing the service order).

• Preview scheduled preventive maintenance services and make changes as necessary.

• Review the preventive maintenance history for installed products.

For any installed product that is eligible for a preventive maintenance service, the system creates a *preventive maintenance entry.* This entry tracks the preventive maintenance process life cycle of each installed product. The preventive maintenance entry updates each time that the status of the corresponding service order changes during the process. When the entry is marked as completed at the end of the cycle, the system reevaluates the associated installed product for another preventive maintenance cycle. If the installed product passes the evaluation, the system automatically generates another entry for it, which starts a new preventive maintenance cycle.

• Automatically generate service orders for preventive maintenance, calculate the service order start date and time based on agreement entitlements, and assign service orders to appropriate technicians.

The system automatically assigns technicians only if you have auto assignment configured. Dispatchers and field service specialists can use the dispatch board to view these service orders and manage technician assignment schedules.

These terms are used frequently in this chapter:

| Term | Definition |
|---|---|
| Valid agreement | An agreement is considered valid if the line status is set to *Active,* and the current system date is between the agreement line's start and end dates. |
| Preventive maintenance entry | A preventive maintenance entry is a row in the Preventive Maintenance History table (RF_INST_PROD_PM) for an installed product that passes the validation test and that is qualified for the preventive maintenance process. Preventive maintenance entries are used to track the statuses of preventive maintenance service orders.<br><br>The system creates one preventive maintenance entry per installed product per service per agreement. An installed product can have more than one entry simultaneously if it is associated with multiple preventive maintenance services, or if it is associated with a service that is made available to more than one agreement line or agreement. |
| Next preventive maintenance due date | This is the date when the next preventive maintenance service for an installed product is scheduled to start.<br><br>When the system initially inserts a preventive maintenance entry for an installed product, the system uses this equation to calculate the date:<br><br>(Next Preventive Maintenance Due Date) = (Installed Product Installation Date) + (Frequency)<br><br>The system then verifies whether the calculated date falls between the start and end dates of the agreement line.<br><br>If the calculated date is earlier than the agreement line start date, the system schedules the preventive maintenance so that the creation date is the system date. The service order date is the creation date plus the lead time. The system also takes into account the service level when making this calculation.<br><br>For subsequent preventive maintenance entries that are created for this installed product, the system uses this equation to calculate the next preventive maintenance due date:<br><br>(Next Preventive Maintenance Due Date) = (Service Order Completion Date) + (Frequency) |

# Preventive Maintenance Process Flow

This flowchart and the text describe the preventive maintenance process:
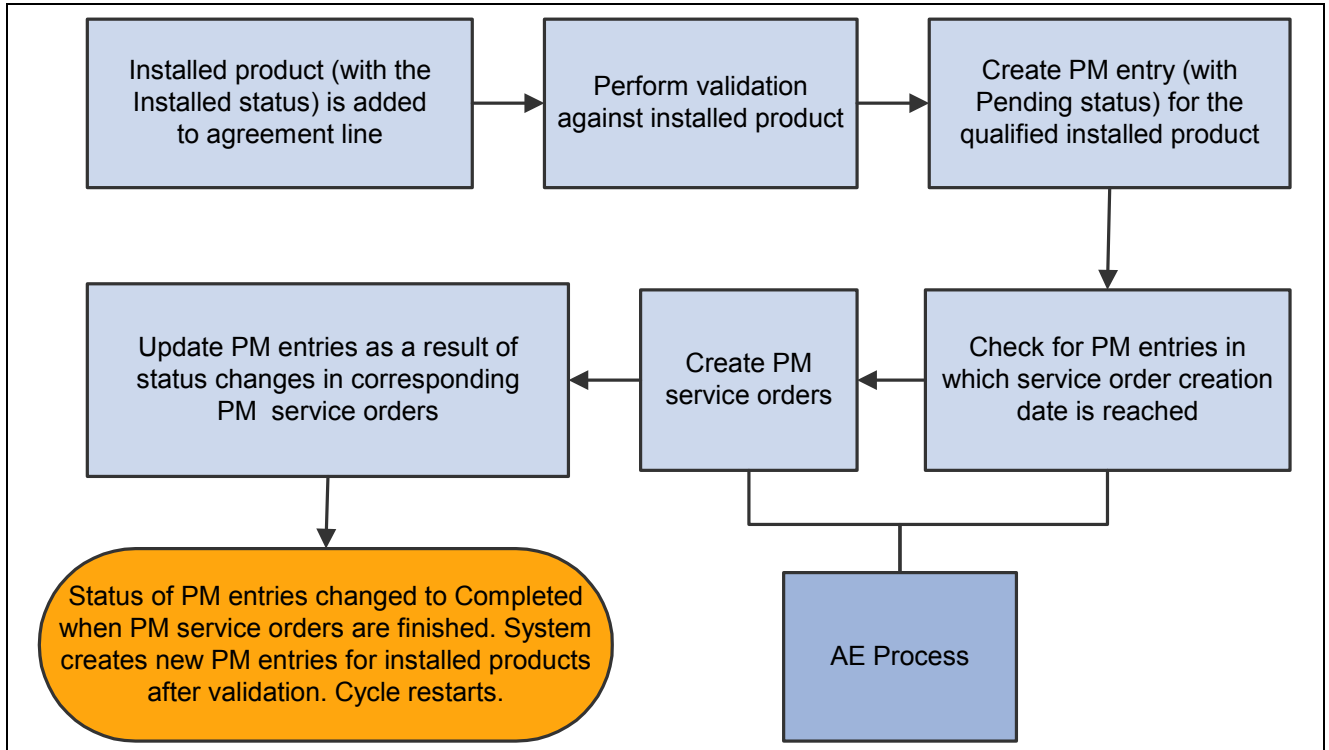


Preventive maintenance process flow

## Validation of Installed Products for Preventive Maintenance

The preventive maintenance process begins when an installed product is added to an agreement line that is defined for a preventive maintenance service type and is saved.

The installed product is then evaluated for preventive maintenance eligibility by using the these validation rules:

- The status of the installed product is set to *Installed.*

- An asset tag or serial number exists in the installed product.

- The installed product is covered by a valid agreement that is associated with a preventive maintenance service, and its next preventive maintenance due date (which is calculated by the system) falls between the start and end dates of the agreement line.

- The installed product does not already have a preventive maintenance entry with a status set to *Pending* for the same preventive maintenance service for which the system considers adding a new preventive maintenance entry.

For every installed product that passes the evaluation, the system inserts a preventive maintenance entry with a status of *Pending* in the Preventive Maintenance History table.

## Creation of Preventive Maintenance Entries for Qualified Installed Products

The system creates preventive maintenance entries for installed products that are eligible for preventive maintenance. It uses preventive maintenance entries to manage the life cycle of corresponding service orders throughout the process (from creation to completion). Based on the information in pending entries, service orders are generated through an Application Engine process. From this point on, the system tracks all preventive maintenance service orders by updating their associated preventive maintenance entries when statuses change in respective preventive maintenance service orders.

A preventive maintenance entry, which appears on the Preventive Maintenance Detail page, is initially created with the these properties:

- A status set to *Pending*.

- A value in the Start Date field that is equivalent to the next preventive maintenance due date.

  If this preventive maintenance entry is the first one created for the installed product, the service order start date equals the installed product's installation date plus the frequency.

  If the calculated service order start date precedes the start date of the selected agreement line, the system schedules the preventive maintenance so that the creation date is the system date. The service order date is the creation date plus the lead time.

  For example, suppose that a product was installed on January 1, and this installed product was added to an agreement on February 21. With the frequency set to once per month, the service order start date of this preventive maintenance entry becomes February 21. In this case, the system increments the service order start date by the frequency to March 21 and verifies that this date is covered by the agreement. No preventive maintenance entries are created if this date goes beyond the agreement end date.

  **Note.** If you have enabled the automatic calculation of service order dates and times in the system, all preventive maintenance-related date calculations are based on the service level, response, and restore times of the associated agreement. This means that only contractually defined working days are considered in the calculation. Any calculated service order start date that falls on a nonworking day is automatically rescheduled to the next available working day.

  See Chapter 7, "Creating and Managing Service Orders," Understanding Automatic Calculation of Dates and Times for Service Orders, page 72.

- A service order number appears when the Application Engine process creates a service order.

  **Note.** You can modify information (including the business unit, agreement details, service order start, and creation dates) in the preventive maintenance entry as long as that information has a status set to *Pending*.

## Validation of Preventive Maintenance Entries for Service Order Creation

PeopleSoft Integrated FieldService uses an Application Engine process to identify installed products for which preventive maintenance service orders must be generated.

When the process runs, it looks up all installed products that:

- Are set to a status of *Installed*.

- Are controlled by an asset tag or serial number.

- Are covered by a valid agreement.

- Have a pending preventive maintenance entry.

The process compares the current system date with the service order creation date (that is, the next preventive maintenance due date minus the lead time defined in the Service component) in each of these entries. If the system date is later than or equal to the service order creation date, a preventive maintenance service order is generated.

If there are preventive maintenance entries in which the service order creation date is past due (which occurs if the process has not run as scheduled for some reason), the system pushes out the service order creation date for these preventive maintenance entries by one day (from the system date). This delay enables the entries to still be evaluated for service order creation.

Once the service order is created, the system populates the Required Start Date field of the first service order line with the start date of the preventive maintenance service order. If you have enabled the automatic calculation of service order dates and times feature, the system takes the agreement entitlements (namely the specified service level, response, and restore times) into account when it calculates the required start date for the preventive maintenance service order. In addition, the system populates the service order number in the corresponding preventive maintenance entry and changes the entry status to *Created.*

## Change of Status in Preventive Maintenance Entries

The status of a preventive maintenance entry changes as a result of a status update in its corresponding service order. For example, when a preventive maintenance service order is automatically created and its status is set to *Open,* the status of the associated preventive maintenance entry is set to *Created.*

This table summarizes the conditions under which status changes in preventive maintenance entries occur:

| Condition | Service Order Status Changes To | Preventive Maintenance Entry Status Changes To | Other Updates in the Preventive Maintenance Entry |
|---|---|---|---|
| A preventive maintenance entry is created. | Not applicable (NA) | *Pending* | NA |
| A service order is generated. | *Open* | *Created* | The service order number is populated on the preventive maintenance entry. |
| A technician is at the customer site awaiting customer response or is on hold for parts. | *Open - On Site* (service order line status) | *In Progress* | NA |

| Condition | Service Order Status Changes To | Preventive Maintenance Entry Status Changes To | Other Updates in the Preventive Maintenance Entry |
| --- | --- | --- | --- |
| A service order is completed. | *Complete* | *Completed* | The system updates the Date field in the Preventive Maintenance History group box on the Preventive Maintenance Detail page with the service order completion date.<br><br>A new preventive maintenance entry (with a status set to *Pending*) is created if required validations are passed. |
| A service order is canceled. | *Canceled* | *Canceled* | NA |

## Completion of the Preventive Maintenance Process Life Cycle

The preventive maintenance process is approaching the end when the header status of the preventive maintenance service order changes to *Completed.* This status change takes place automatically when all associated service order activities have a status set to *Completed, Canceled,* or *Closed.*

When that happens, the system verifies that the installed product that is selected for this service order has a status of *Installed* and is covered by a valid agreement that is associated with a preventive maintenance service (in which the Preventive Maintenance check box of the service type for this service is selected in the Service Type record). Next, the system locates the corresponding preventive maintenance entry, which has the number of this completed service order and has a status of *Created* or *In Progress.* The system updates the date with the service order completion date and changes the status to *Completed.*

The ending of one preventive maintenance process may or may not mean the beginning of another one. The system uses the next preventive maintenance due date to decide whether the preventive maintenance process should continue for any installed product. As the status of a preventive maintenance entry is set to *Completed,* the system calculates the next preventive maintenance due date and verifies whether the date is covered by a valid agreement in which the corresponding preventive maintenance service is defined. If it is covered by the agreement, the system generates a new pending preventive maintenance entry in the Preventive Maintenance History table, and the next preventive maintenance due date is calculated by using the service order completion date plus the frequency. Additionally, the system looks for renewed agreements.

The preventive maintenance process discontinues if the next preventive maintenance due date that is calculated goes beyond the agreement end date.

The preventive maintenance entry status changes to *Canceled* if the associated preventive maintenance service order is canceled. In this case, a new pending preventive maintenance entry is generated with no service order number, and the next preventive maintenance due date is calculated as the service order cancellation date plus the frequency. However, if you cancel the preventive maintenance entry for the installed product, the preventive maintenance process cycle for the installed product stops. To restart the process, you must use the Preventive Maintenance Detail page to manually enter a preventive maintenance entry for the installed product with a status of *Pending.*

# Setting Up Scheduled Preventive Maintenance

To set up the preventive maintenance feature:

1. Select the Allow Preventive Maintenance check box (on the FieldService Definition page) for all business units on which you want to run preventive maintenance.

2. Define a preventive maintenance service type by using the Service Types component.

   Note that in PeopleSoft Integrated FieldService, preventive maintenance is available only to services that are defined under service types that are designated as preventive maintenance. In a given setID, you can specify multiple service types to be designated as preventive maintenance by selecting the Preventive Maintenance check boxes that are associated with them on the Service Types page.

3. Define the lead time and frequency for preventive maintenance services.

   The preventive maintenance feature applies to preventive maintenance services only. When you define a service and select a preventive maintenance service type on the service record, the Preventive Maintenance check box is automatically selected; you cannot modify it.

   **Note.** You cannot edit the Preventive Maintenance check box on the service records of any services that are defined with a preventive maintenance service type, unless the Preventive Maintenance check box of the associated service type is cleared.

   In addition, the system displays the Lead Time (required) and Lead Time Interval fields on the Service page, where you define how many days, weeks, months, or years in advance of the actual service to generate a service order for the preventive maintenance service.

   Another piece of information that you specify in the Service component is the frequency (how often the preventive maintenance process for a service repeats itself). The system uses the frequency to calculate the next preventive maintenance due date that is recorded in preventive maintenance entries.

   When you enter the start and end dates for the service frequency, the system ensures that both dates fall within the service offering time line and do not go beyond the service start and end dates. The system issues a warning if a frequency is not defined for preventive maintenance services; in this case, the preventive maintenance process doesn't start.

   Note that the system issues an error if the lead time is greater than the frequency. For example, suppose that you defined a service in which the lead time is set to two months and frequency is set to every one month. Today is June 1. The system must create a new preventive maintenance entry for this service because the current service order was finished this morning. According to the lead time and frequency values in the service record, the next preventive maintenance due date (the service order completion date plus the frequency) is scheduled for July 1, and the service order creation date (the next preventive maintenance due date minus the lead time) is May 1: a day that has already passed. To avoid this error, always set a lead time that is less than or equal to the frequency.

4. Select a field service business unit for preventive maintenance services.

   As you define a preventive maintenance service, select the field service business unit under which to assign the service orders that are created for this service. The Field Service Unit field is available only for preventive maintenance service records. You can overwrite the business unit that is specified for service orders on preventive maintenance entries as long as they have a status set to *Pending*.

5. Define agreement lines for installed products.

Before inserting a preventive maintenance entry or creating a service order for a preventive maintenance service, the system verifies whether the corresponding installed product has a valid agreement. Make sure that you have added all installed products on which you want the preventive maintenance process to run to an available agreement that has not expired.

6. Run the Application Engine process for every business unit that uses the preventive maintenance feature.

   The process creates the service orders for the preventive maintenance services.

   **Note.** We recommend that you schedule the process to run nightly.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties," Defining Detailed Agreement Line Information

*Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

# Managing Scheduled Preventive Maintenance

This section discusses how to:

• Edit the pending preventive maintenance entry and review the preventive maintenance history summary.

• View preventive maintenance details.

• Create preventive maintenance service orders.

## Pages Used to Manage Scheduled Preventive Maintenance

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Preventive Maintenance Detail | RF_INST_PROD_PM | Installed Product and Service, Preventive Maintenance Detail | View or update the pending preventive maintenance entry, and review the history of preventive maintenance entries that is created for the selected installed product. |
| Review Preventive Maintenance | RF_IP_PM_INQUIRY | FieldService, Review Preventive Maintenance, Review Preventive Maintenance | View preventive maintenance entry details from the search page and view their information on the installed product and service order. |
| Preventive Maintenance Details | RF_IP_PM_SEC_INQ | Click the installed product number link on the Review Preventive Maintenance page. | View a summary of the installed product and service order information associated with the selected preventive maintenance entry. View customer, product, agreement, order capture, and service order information. Click various transfer buttons to access corresponding components. |
| Preventive Maintenance | RUN_CNTL_RFSOADD | FieldService, Generate PM Service Orders, Preventive Maintenance | Define run control parameters for the Preventive Maintenance process (RF_PM_SO_ADD). |

## Editing the Pending Preventive Maintenance Entry and Reviewing the Preventive Maintenance History Summary

Access the Preventive Maintenance Detail page.

Preventive Maintenance Detail page

**Note.** The Preventive Maintenance Detail page is accessible only to installed products that are controlled by asset IDs or serial numbers.

## Pending Preventive Maintenance Service Orders

Displays information related to the pending preventive maintenance entry that is inserted into the Preventive Maintenance History table. You can modify the fields here as long as the entry has a status of *Pending.* (The fields are blank when there is no pending preventive maintenance entry.) Click the Add a new row button to manually create a new pending preventive maintenance entry for the installed product (for example, when the previous one has been canceled and you want to start the cycle again).

| | |
|---|---|
| **Agreement Code** | Select the name of the agreement that is used to cover the selected service. Click the Transfer to Agreement button to access the Agreement component. |
| **Renewal Number** | Select the renewal version of the agreement. |
| **Line Number** | Select the agreement line number that covers the service and service product (that is, the selected installed product). If you have selected an agreement, clicking the Transfer to Agreement Line button takes you to the Agreement Line page. If no agreement is selected, the system takes you to the Agreements component where you can add a new agreement. |
| **Service** | Displays the service for this preventive maintenance entry. Click the Transfer to Service button to access the Service component. |
| **Business Unit** | Select the business unit for this preventive maintenance entry. Service orders that are generated for this entry are categorized under the selected business unit. |
| **Status** | Select the status of the preventive maintenance entry: |

*Pending:* Indicates the default status of a new preventive maintenance entry. By default, the preventive maintenance process sets the entry status to *Pending* and updates the status according to the status change of the associated service order.

*Created:* Indicates that a service order has been generated for the corresponding preventive maintenance service.

*In Progress:* Indicates that the preventive maintenance service order has a service order line with one of the these statuses: *Open - Hold Assignment, Open - Hold Part,* or *Open - On Site.*

*Completed:* Indicates that the preventive maintenance service order is complete.

*Canceled:* Indicates that the preventive maintenance service order has been canceled.

**Comments**                              Enter a note for the preventive maintenance record. Any message that was generated during the create preventive maintenance process is captured by the system in this field.

## Preventive Maintenance History

This section displays a list of preventive maintenance entries that is generated for the selected installed product.

**Date**                                  Displays the service order start date that is entered for the preventive maintenance entry.

**Business Unit**                         Displays the business unit to which the preventive maintenance entry belongs.

**Service Order ID**                      Displays the ID of the service order that is created for the preventive maintenance service. Once the service order is generated through the preventive maintenance process, the system populates the Service Order ID field in the preventive maintenance entry and changes its status to *Created.* Click the Transfer to Service Order button to access the Service Order component.

**Status**                                Displays the preventive maintenance entry status.

# Viewing Preventive Maintenance Details

Access the Preventive Maintenance Details page.

**Preventive Maintenance Details**

**Installed Product Details**

SetID CRM01                                    Installed Product ID INS0000013

**Customer Information**

Customer Name MMA Property Management Group1        Site Name Minneapolis

Department

**Product Information**

Product 24 in. Dishwasher 5 Cycles (St           Date Installed 07/07/2000

Item 24 in. Dishwasher 5 Cycles (St              Order Date 07/01/2000

Serial ID SR1015-1009                            Asset Tag

**Agreement Information**

Agreement Code COM-AGR-107                       Renewal Number 1

Line 001

**Service Order Details**

Unit US200                                       Status Pending

Service Order ID                                 Service Order Date 08/11/2002

Service Preventive Maintenance on Dish           Creation Date 08/06/2002

Comments Preventive Maintenance Service Created from Agreement Transaction

Preventive Maintenance Details page

## Order Capture Information

The system displays this section only if there is an integration with PeopleSoft Order Management.

| | |
|---|---|
| **Business Unit** | Displays the business unit that PeopleSoft Order Management (part of PeopleSoft Supply Chain Management) used when the order was created for the product. |
| **Capture ID** | Displays the order number that PeopleSoft Order Capture used when the order was created. |
| **Order Number** | Displays the order number that PeopleSoft Supply Chain Management used if the order request was sent to the system from PeopleSoft Order Management. |
| **Line** | Displays the line number that PeopleSoft Supply Chain Management used if the order request was sent to the system from PeopleSoft Order Management. |

## Service Order Details

| | |
|---|---|
| **Unit** | Displays the field service business unit under which the service order is categorized. |
| **Service Order Date** | Displays the date when the service order starts. |
| **Creation Date** | Displays the date when the service order was generated. |

**Comments**                          Enter a note for the preventive maintenance record.  Any message that was
                                      generated during the create preventive maintenance process is captured
                                      by the system in this field.

# Generating Preventive Maintenance Service Orders

Access the Preventive Maintenance page.

To create service orders for installed products that are eligible for preventive maintenance services, run the
Preventive Maintenance process.  It is recommended that you schedule this process to run nightly.

## See Also

*Enterprise PeopleTools PeopleBook:  PeopleSoft Process Scheduler*

# PART 3

# Service Order Management

**Chapter 7**
**Creating and Managing Service Orders**

**Chapter 8**
**Ordering and Receiving Materials**

**Chapter 9**
**Working with My Service Orders**

# CHAPTER 7

# Creating and Managing Service Orders

This chapter provides an overview of service orders and describes how to:

• Set up automatic calculation of dates and times for service orders.

• Set up automatic service order assignments.

• Set up service order assignment notifications.

• Set up service order escalation notifications.

• Manage service orders.

## Understanding Service Orders

This section discusses:

• The service order data model.

• Service order status levels.

• Methods for accessing service orders.

• Service order toolbar functions.

**Note.** PeopleSoft Customer Relationship Management (PeopleSoft CRM) delivers an enterprise integration point (EIP) that you can use to integrate service orders with third-party voice recognition applications.

### See Also

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

### The Service Order Data Model

A service order records a request for a service provided by the company. You can assign a service order to the technicians who will perform the requested work, order materials that are required to perform the work, and track progress. You can also record expenses and labor time and material usage that are incurred while performing the requested work.

In PeopleSoft CRM applications, call center agents and dispatchers can enter multiple service orders for a case in PeopleSoft Support or enter a service order directly in PeopleSoft Integrated FieldService. Service technicians can work with a streamlined view of the service orders that have been assigned to them through the My Service Order component.

Each service order is composed of a header, which captures customer, service, and agreement information and at least one activity, which represents the work associated to the service requested by the customer. As illustrated in the this first diagram, each activity of a service order is associated with one or more technician assignment and material management records.
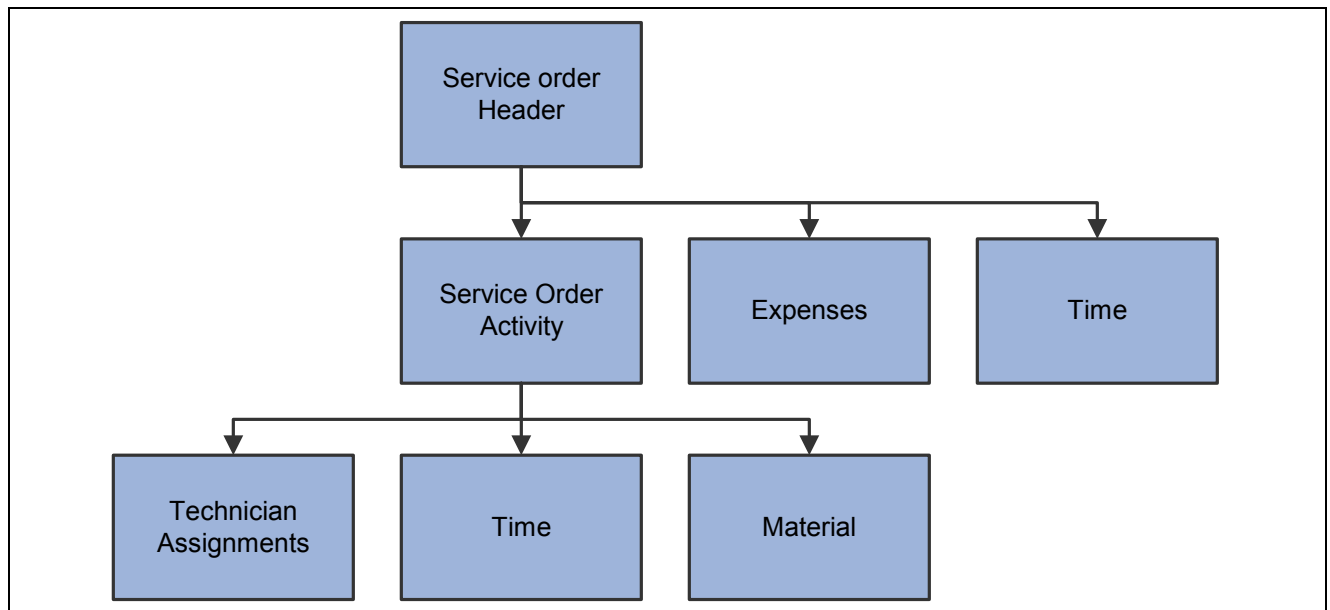


Service order data model

The following illustration shows how the system processes information using the pages contained within the Service Order component to perform various actions throughout the service order management process.
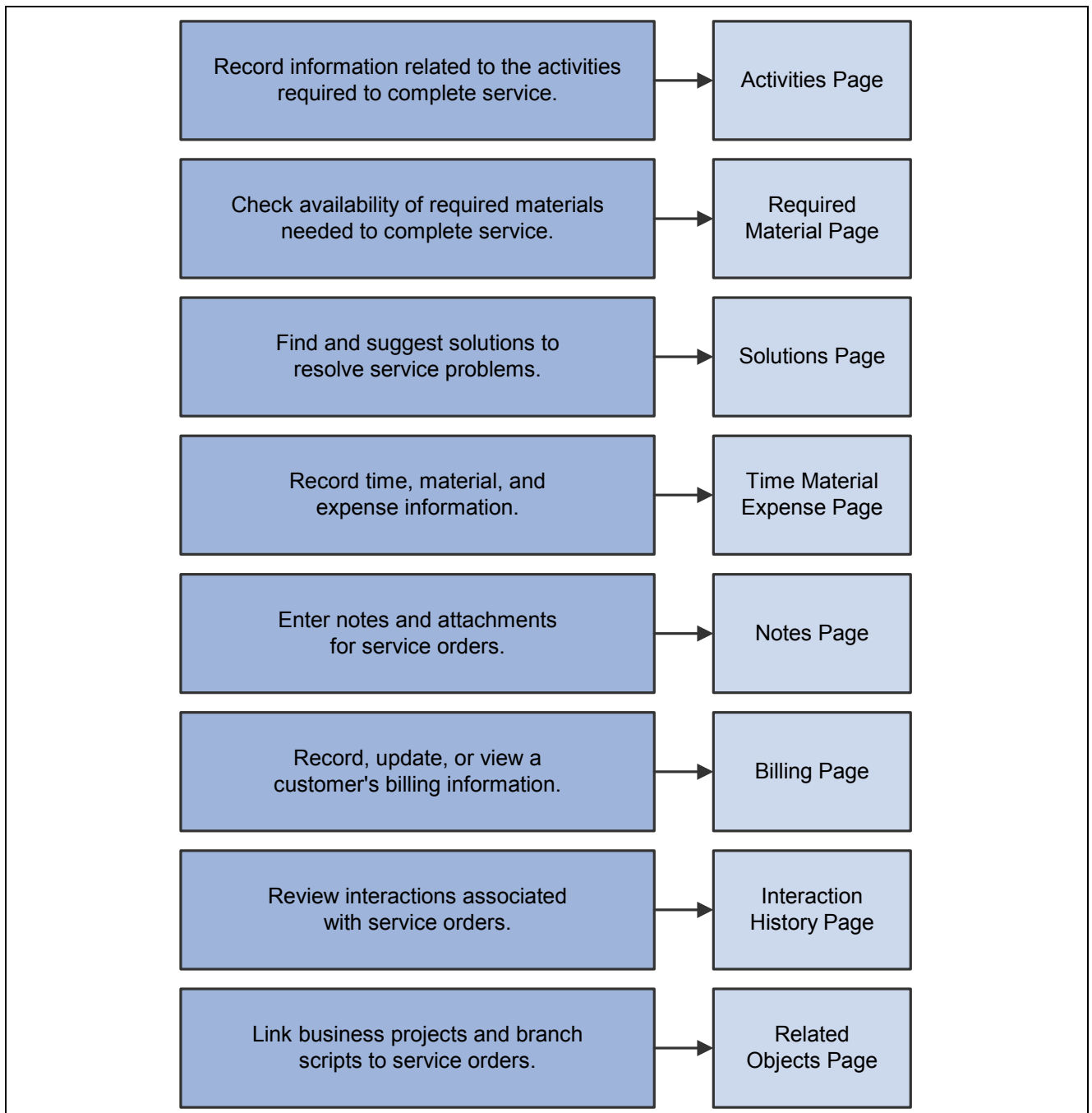
Service order processing

You can perform technician assignments manually on the Service Order activities page, or you can enable the system at the business unit level to automatically assign provider group and group members to new service orders. You can also default a provider group and technician from the service order.

In PeopleSoft Integrated FieldService, you can enable the system at the business unit level to automatically calculate the committed start and end dates and times for service orders. When you select an agreement, warranty, or on-demand service in the service order, the system performs the calculation based on the response and restore entitlements of the selected agreement or warranty and displays the associated entitlement information in the Entitlements group box on the Service Order page.

Service entitlements are primarily used if both the agreement and warranty are not available for the service order.

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**Note.** If the service is being covered by a warranty, but the warranty does not have any restore and response entitlements, then these entitlements will come from the service definition. If the service is being covered by an agreement which has no restore and response entitlements, no calculation is done.

---

Depending on your business needs, you can launch a business project or branch scripts from a service order. Use a business project to coordinate and track the work involved in performing a sequence of tasks, and use a branch script as a tool for technicians to troubleshoot service tasks. From the Service Order component, you can also view a list of interactions that were created for the service order and view or add notes and attachments to the service order at the header and activity levels.

### See Also

# Service Order Status Levels

The service order status reflects the current processing state of a service request. The processing status is tracked at two levels: the service order header and the service order activity. The header level reflects the general processing status of the entire service request, while activity-level status provides a more detailed view of each activity that is associated with the service request.

## Header Level Status

At the header level, a service order can have one of four status values:

| | |
|---|---|
| ***Open*** | This is the initial status of a new service order. At the service order header level, the status remains open until all associated service order activities have a status of *Completed, Canceled,* or *Closed*. |
| ***Completed*** | When all associated activities have a status of *Completed, Canceled,* or *Closed,* the system automatically changes the status at the service order header level to *Completed*. You can record time, expense, material usage, and billing information (if the service order is billable) and view address information. However, you cannot order additional material for the service order or change any of the field values on the Service Order page except the status value. You can change the status from *Completed* to *Closed* or *Canceled*. |

---

**Note.** If required, the service order must be approved at the header level to attain the *Completed* status.

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| | |
|---|---|
| ***Closed*** | The service request has been finished and all time, expense, and material information has been entered. For billable service orders, set the service order status to *Closed* when all time, material, expense, and billing information has been recorded for a completed service order. Once the service order header status is changed to *Closed,* you cannot change the status again or make any changes to the service order or to the associated time, material, and expense records or billing information. |

**Note.** The system automatically initiates the billing process if you have set up an integration to the Transaction Billing Processor when the status changes to closed.

*Canceled*

You can select this status at the level of the service order header only if all associated service activities have a status of *Completed, Canceled,* or *Closed.* Once the service order header is set to *Canceled,* you cannot change the status again nor modify any other fields on the Service Order page. However, you can continue to enter associated time and material records for associated completed or canceled service order activities that were previously recorded for the closed activities on the canceled service order. The system, however, does not record expenses against activities.

**Note.** If you change the status to canceled at the service order level, the system will not initiate billing even if you have items marked as billable. Also, you cannot make any time changes.

## Activity Level Status

Each service order activity on a service order can have one of the these status values:

*Accepted*

To accept an assignment, the technician or a representative for the technician manually changes the activity status to this value.

**Note.** Once the status has been set to *Accepted,* it cannot be changed to *Hold Assignment, Assigned,* or *Rejected.*

*Assigned*

When a technician is assigned to a service order activity, the system automatically changes the activity status to this value.

*Canceled*

Once the service order activity status is changed to *Canceled,* you cannot make any changes to the fields on the service order activity or order material for the activity. However, you can continue to capture associated time and material information for the activity until the status at the header level is changed to *Closed.*

*Closed*

After you record all time, material, and billing information for a completed service order activity, select this status to indicate that billing processes can be initiated for the service order.

Once the service order activity status is changed to *Closed,* you should not make any changes to the activity or to the time and material records that are associated with the activity. However, since time and expense don't have to be tied to an activity, you can still enter time and expense information until the service order status is set to *Closed.*

**Note.** Billing is not initiated for individual lines when a user changes the status of an activity to *Closed.* The system does not initiate the billing process until a user changes the status of the entire service order to *Closed.*

*Completed*

When the service order activity reflects this status value, you can record time, expense, and material usage; however, you cannot order additional material for the service order or change any of the field values on the service order

|  | activity except the status value. You can change the status on the service order activity from *Completed* to *Closed* or *Canceled.* |
|---|---|
|  | **Note.** If required, the activity must be approved before you change its status to *Completed.* |
| *En Route* | While the technician is on the way to the customer's site, the technician or a representative for the technician can manually change the activity status to this value. This status value is informational only and can be set manually for a service order activity in any of the open status values, except for *Rejected.* |
|  | **Note.** The system returns an error if you change the service order activity status to *En Route* after it is set to *Completed* or *Rejected.* |
| *Hold Assignment* | A technician has not been assigned to the service order activity. When you first create a service order, the system sets the header status to *Open* and the activity status to *Hold Assignment.*<br><br>The system automatically changes the activity status from *Hold Assignment* to *Assigned* if a technician has been assigned to the service order activity manually by a dispatcher or call center agent, through automatic assignment, or as a result of a default assignment. |
| *Hold Customer* | Work for the service order activity is on hold pending action from the customer. This status value is informational only and can be set manually for a service order activity in any of the *Open* status values. |
| *Hold Part* | Work for the service order activity is on hold pending the receipt of ordered material. This status value is informational only and can be set manually for a service order activity in any of the *Open* status values. |
| *On Site* | On arrival at the customer's site, the technician or a representative for the technician manually changes the activity status to this value. |
|  | **Note.** Once the status has been set to *On Site,* you cannot change it to *Hold Assignment, Assigned,* or *Rejected.* |
| *Rejected* | To reject an assignment, the technician or a representative for the technician manually changes the activity status to this value. Activities with this status can be manually changed to *Hold Assignment, Hold Part, Hold Customer,* or *Assigned.* |
|  | **Note.** Changing the service order activity to *Accepted* or *Rejected* applies to all technicians assigned to the line. You cannot accept or deny specific technician assignments on a service order activity. |

## Summary of Time, Expense, and Material Availability Based on Status

For combinations of *Open, Completed, Closed,* and *Canceled* status values at the service order header, this table summarizes when the time, expense, and manage material transactions can be recorded:

| Header Status | Time, Expense, and Material |
|---|---|
| *Open* | *Enabled* |
| *Canceled* | *Disabled* |
| *Completed* | *Enabled*<br><br>**Note.** Cannot order materials, however. |
| *Closed* | *Disabled* |

# Methods for Accessing Service Orders

You can create or access service orders:

• From the system navigation.

   - Select FieldService, Create a Service Order from the left navigation menu to create new service orders

   - Select FieldService, Search Service Orders from the left navigation menu to update service orders.

   Because service orders are keyed by business unit, you need to enter a business unit when you create or find service orders.

• From the Case component.

   You can create a service order from a PeopleSoft Support case. Access the Related Actions page of the case and create a service order. Enter the business unit (prepopulated with the case's business unit) and service for which the service order is created. The system populates the new service order with the case ID, customer, product, and service information from the case. You can also reselect an agreement or warranty that is specific to the service order. Also, the system defaults the problem description on the service order from the problem summary on the case

• From the 360-Degree View.

   You can create new service orders from the 360-Degree View of a contact or company by selecting *Add Service Order* from the Go To drop-down list box. The system populates the new service order with customer information from the 360-Degree View and the business unit that is defined for the user who is currently signed in from the User Preferences menu. If the business unit value is not specified, the user is asked to enter the business unit for the new service order. You can also view or update service orders that are associated with the given contact or company from the Activities group box.

   From the 360 Degree View page, you can also define an action to create a specific type of service order. In this case, you do not have to supply any additional information. Also, navigating to the newly created service order is optional.

• From PeopleSoft Order Capture.

   You can create service orders through PeopleSoft Order Capture if the customer is ordering a product that requires installation and a service order. Users can select the Installed Product tab on the Product component to see how this is set up.

While service orders are usually created manually by using one of the these methods, some service orders are periodically generated by the system. These service orders, when you have enabled the preventive maintenance functionality in the system, are created by an Application Engine program for installed products that are covered by agreements and require scheduled preventive maintenance services.

### See Also

Chapter 6, "Working with Scheduled Preventive Maintenance," page 47

# Service Order Toolbar Functions

The PeopleSoft CRM toolbar is delivered on the Service Order page and several PeopleSoft Integrated FieldService-related components, providing easy access to PeopleTools actions (such as saving pages), application-specific functions (such as sending notifications in service orders and cases), and useful summary information that is specific to the component that you are viewing.

The configurable toolbar is available for most PeopleSoft Integrated FieldService-related components. These are the list of buttons and data elements that are used in toolbars for these components. Some of them are common across all PeopleSoft CRM applications, whereas some are specific to pages.
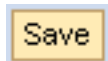
Click the Save button to save the page on which you are currently working.

Click the Search button to go back to the search page with the search results list, which is where you accessed the current page.

Click the Add button to add a new service order.

Click the Next button to go to the next record in the search results list.

Click the Previous button to go to the previous record in the search results list.

Click the 360 Degree View button to access the 360-Degree View page, where you can view details of the company or contact that is listed on the current page and perform transactions.

Click the Notification button to access the Email page (RF_SO_ADHOC), where you can send an email message to a person or provider group. You can apply a delivered template or add attachments to the text message.

The system transfers you to the same page if you click the Email Selected Notes button on the Notes page (summary view). The system prepopulates the subject line and message body with the corresponding service order ID. This functionality is available only to the Service Order and My Service Order components.

This button is also used in the Service component. The system brings you to the Email page (RF_SVC_ADHOC_EMAIL) if you click the button from the Service component.

Click the Correspondence button to access the Create Correspondence page, where you can send text messages to prepopulated recipients through different channels (email or print). PeopleSoft Integrated FieldService delivers two

templates that you can use when a correspondence is sent: *Service Order Status,* which is a thank you note with current service order status information for the customer and *Service Order Status - Failure,* which is a note stating that the status information cannot be retrieved because of an invalid service order ID. You can add attachments to the text message and schedule when it should be delivered. Once a correspondence is sent, the system automatically creates an interaction on the 360-Degree View for the associated contact. The interaction is also viewable from the Interaction History page of the associated service order.

**Note.** Before creating a correspondence, make sure a contact is available on the service order. The system prepopulates the Recipients field of the correspondence request with the contact defined for the service order. If the contact is not available on the service order, the field is populated with the consumer name.

This functionality is available only to the Service Order and My Service Order components. The system passes the business unit, service order ID, customer (either a company or a consumer), and contact name to the correspondence request.

Click the Hierarchy button to view the installed products that meet the customer, site, product, and serial number available on this page. The system displays the parent, child, and sibling relationships for the selected installed products on the Installed Product Hierarchy page. The button is available only from the Service Order, My Service Order, and Installed Product components.

Initially, the system displays only those installed products, services, assets, and agreements with a status of *Installed/Activated.* To view products in other statuses, you must select *All Statuses* or a different status and click Refresh. Activate this functionality only if the user has enabled the Status filter on the tree configuration. Enable the status filter by selecting one or more of the Show Status check boxes on the tree setup. If the user has not selected any status filters, or if no tree configuration is loaded, then the tree displays products of all statuses in the initial view.

**Note.** This button is hidden from the Service Order and My Service Order toolbar if you selected *Prompt for Product Master, Hide Installed Product Information,* or *Hide All Product Information* on the service order configuration template that is used by the business unit of this service order.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook,* "Tracking Installed Products and Assets," Setting Up Trees for Installed Products.

Click the Email button to access the Outbound Email page where you can select templates, add attachments, and send email to recipients.

Click the Map Dashboard button to access the Map Dashboard page and view the map and tabular data generated for the currently opened service order. This functionality is accessible from the page in the Service Order and My Service Order components and is available only when Environment Service Research Institute (ESRI) is installed.

| | |
|---|---|
| **Personalize** | Click to access the Personalize Toolbar page, where you can change the way buttons appear on the toolbar and hide them. |
| **Time Zone** | Select to display dates and times at both service order header and activity levels based on the selected time zone. Options include: |
| | *My Time Zone:* Your local time zone, according to your user personalizations. |
| | *Customer:* The customer's time zone, based on the time zone selected for the address that is associated with the site, contact, or customer. |
| | **Note.** If you select the time zone of *Customer,* the PeopleSoft CRM system first checks for and uses the time zone that is associated with the site's primary address. If this information is unavailable, it looks for the time zone that is defined in the contact's primary address. If this information is also unavailable, the system uses the time zone that is associated with the customer's primary address. If none of these addresses includes time zone information, the date and time display remains the same regardless of what you select. |
| **Customer Value** | Displays the value of the customer derived from the Customer Data Model (CDM). This value is also available from the Company page. |

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Using the 360-Degree View"

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Understanding Correspondence and Notifications"

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Setting Up ESRI Integration"

# Setting Up Automatic Calculation of Dates and Times for Service Orders

This section provides an overview of the automatic calculation of dates and times for service orders and discusses how to set up the automatic calculation of dates and times for service orders.

## Understanding Automatic Calculation of Dates and Times for Service Orders

For each service order activity, you enter planned dates and times that indicate when the assigned technician is planning to begin and finish the task based on customer's entitlements. These values are used in service order workflow processes that help you monitor service order statuses and send out notifications if any service order fails to begin at the committed start time or to finish at the committed end time.

**Note.** The system uses only the dates at the header level (committed or customer preferred) for Active Analytic Framework (AAF) processing and notifications.

In PeopleSoft Integrated FieldService, you can turn this manual calculation process into an automatic one by enabling the automatic calculation functionality at the business unit level in the PeopleSoft CRM system.

When you create a service order and select an agreement, warranty, or on-demand service, the system automatically calculates the committed start and end dates and times for service order activities based on the entitlements that are associated with the selected agreement, warranty, or service. The system also populates the values in corresponding fields.

This diagram outlines the process flow for the automatic calculation of dates and times for service orders:

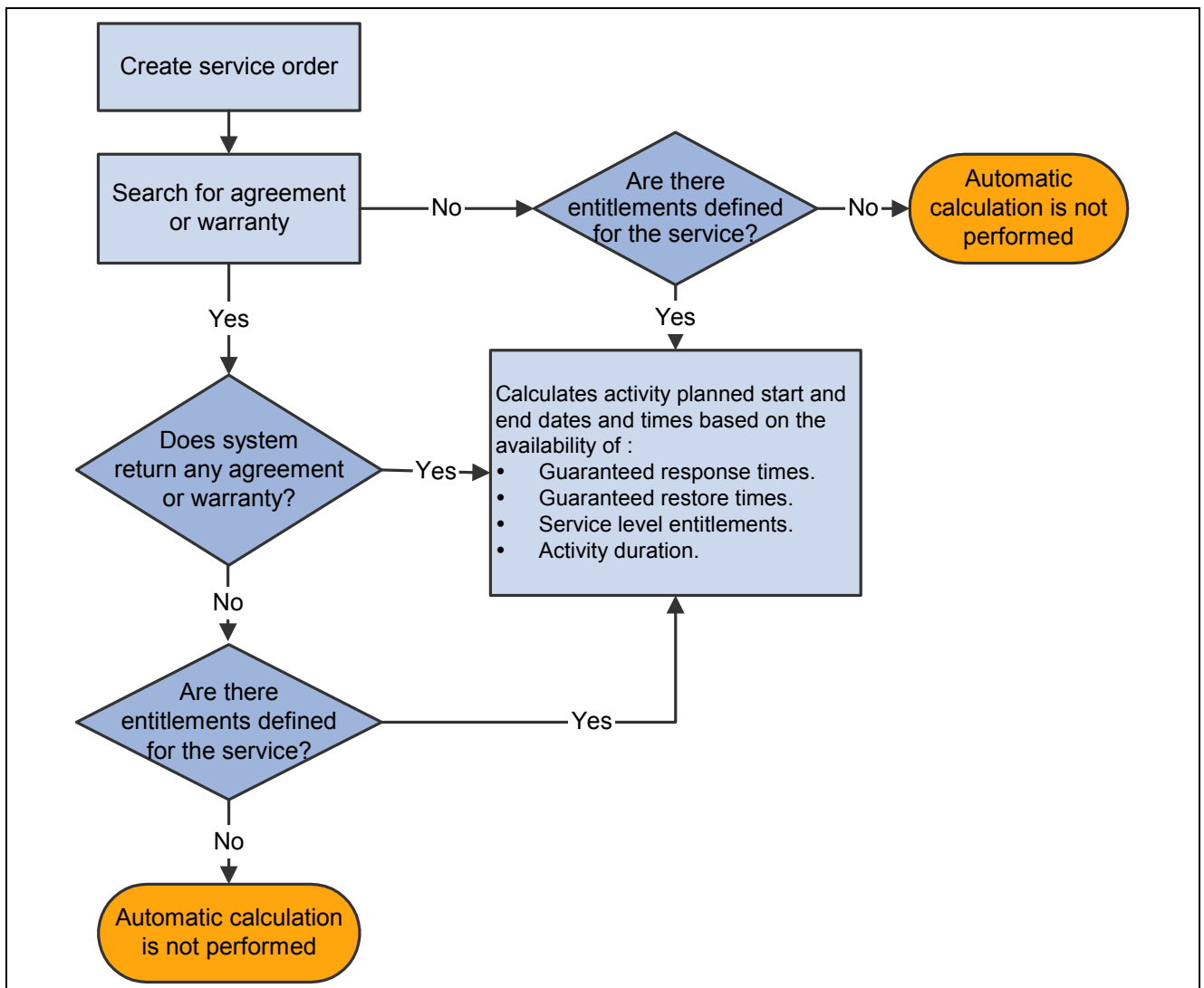Process for automatic calculation of dates and times for service orders

As you click the Select Agreement or Warranty button on the service order to search for and select an applicable agreement line or warranty, the system calculates the committed start and end dates and times for the service order based on the entitlements that are associated with the selected agreement or warranty. The system also calculates the task duration of service activities that are linked to the service order. The calculation is done at two levels: once at the overall service order level where the service level, guaranteed response, and guaranteed restore times are used to calculate the committed start and end dates and times; and again at the service order activity level, where the service level, guaranteed response time, and task duration are used to calculate the planned start and end dates and times of the service order activity.

The same calculation occurs when you select a new service for the service order with or without any preselected agreement or warranty. If an agreement or warranty already exists and the new service has multiple service activities, the system replaces old service order activities with new ones and recalculates the staggered dates and times for all service order activities based on the estimated task duration that is derived from the new service activities. In the absence of an agreement or warranty, the system uses the service entitlements that are defined in the Service component in the calculation.

**Note.** The agreement or warranty entitlements take precedence over the service entitlements. For example, if you select an agreement or warranty after a service has been specified on the service order, the system performs the automatic calculation of planned start and end dates and times for service order activities again by using entitlements of the selected agreement or warranty.

## Hours of Operation and Holiday Schedules

Hours of operation (or service levels) are tied to entitlements, so a customer's entitled response and restore time will take hours of operation into consideration. The system uses the same logic for holiday schedules.

If an agreement is entitled with regular hours of operation but the business is closed on public holidays, the entitlement needs to take the holiday schedule into account as well (for example, Labor Day).

For a platinum customer, however, the agreement could entitle the customer to support 7 days a week, 24 hours a day, with no holiday consideration. In this case, a platinum customer calls in at 4 p.m. Thursday afternoon with a 24 hour response time. If the next day happens to be a public holiday, the customer is still entitled to a response by 4 p.m. Friday, regardless of the holiday.

On the Service Level page, you can use the Holiday Schedule field to select the holiday schedule you want associated with the service level. The system defaults the holiday schedule to the agreement line when the service level is specified.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties".

## Calculating Overall Committed Start and End Dates and Times for Service Orders

To calculate the overall committed start and end dates and times of a service order, the system uses these entitlements as calculation inputs:

- Guaranteed response time (the guaranteed amount of time within which a customer receives a response from the service provider regarding the reported issue).

- Guaranteed restore time (the guaranteed amount of time within which product functionality needs to be restored for customer).

- Service level (the service provider's days and hours of operation).

Once these values are identified, the system calculates the planned start and end dates and times by using the these formulas:

(Committed Start Date and Time) = (Current Date and Time) + (Guaranteed Response Time) + (Service Provider's Nonworking Hours)

(Committed End Date and Time) = (Current Date and Time) + (Guaranteed Restore Time) + (Service Provider's Nonworking Hours)

For example, a customer reports an issue and a service order is created on Friday, July 19, at 1 p.m. Suppose the customer has these entitlements:

• Guaranteed response time: 2 hours (120 minutes).

• Guaranteed restore time: 10 hours (600 minutes).

• Service level: 8 a.m. to 5 p.m., Monday through Friday.

According to the service level, no service is provided after Friday at 5 p.m. until the next Monday at 8 a.m.; therefore, the end date needs to be extended to next Monday. The calculations are as follows:

(Committed Start Date and Time) = (July 19 at 1 p.m.) + (2 hours) + (0 hour) = (July 19 at 3 p.m.)

(Committed End Date and Time) = (July 19 at 1 p.m.) + (10 hours) + (63 hours from July 19 at 5 p.m. through July 22 at 8 a.m.) = (July 22 at 2 p.m.)

The calculated committed start and end dates and times are Friday, July 19, at 3 p.m. and Monday, July 22, at 2 p.m., respectively. After the calculation is completed, the system displays the date and time values in the Entitlements Section in the Service Details group box on the Service Order page.

## Calculating Planned Start and End Dates and Times for Service Order Activities

To calculate the planned start and end dates and times of a service order activity, the system uses these calculation inputs:

• Guaranteed response time (used by only the first service order activity)

• Guaranteed restore time (if no response time)

• Service level

• Task duration of the service order activity

The system populates the planned start date and time of the first service order activity with the values that are calculated for the overall service order. It then calculates the planned end date and time of this service order activity by adding the activity's task duration (specified in the Duration field) to its planned start date and time.

**Note.** The system will also go backwards to calculate planned start and end dates; so, if you have a restore time only, it starts with the last activity and goes backwards to compute the proper dates.

If there are multiple service order activities in the service order, the planned start and end dates and times of other service order activities are calculated by using these formulas:

(Planned Start Date and Time) = (Planned End Date and Time of Previous Line) + (1 minute)

(Planned End Date and Time) = (Planned Start Date and Time) + (Task Duration)

For service orders that include multiple service order activities, the planned start and end dates and times are staggered serially based on the estimated duration for each service activity. The planned start date and time of the next service order activity is calculated by adding one minute to the end date and time of the previous task.

The calculation staggers the planned start and end dates and times for service order activities based on their step numbers. When service activities have the same step number (that is, parallel tasks), they will have identical planned start dates and times. Because the planned end date and time of parallel tasks are based on the estimated duration of tasks, their end dates and times are different if they have different task durations. The system uses the latest end date and time of the parallel tasks to calculate the planned start date and time of the next task.

From the previous example where the overall start and end dates and times are calculated, the service order is planned to start on Friday, July 19, at 3 p.m. Suppose this service order has four service order activities. Based upon the step number and estimated task duration for each service activity, the planned start and end dates and times of each service order activity are calculated:

| Service Order Activity | Step Number | Estimated Duration (Hours) | Planned Start Date and Time | Planned End Date and Time |
|---|---|---|---|---|
| Diagnose Issue | 10 | 3 | Friday, July 19, 3 p.m. | Monday, July 22, 9 a.m. |
| Repair Refrigerator | 20 | 2.5 | Monday, July 22, 9:01 a.m. | Monday, July 22, 11:01 a.m. |
| Repair Compressor | 20 | 2 | Monday, July 22, 9:01 a.m. | Monday, July 22, 11:31 a.m. |
| Preventative Maintenance on Refrigerators | 30 | 1 | Monday, July 22, 11:32 a.m. | Monday, July 22, 12:32 p.m. |

The assigned technician begins working on the first service activity at 3 p.m. on Friday and finishes it at 9 a.m. next Monday. Because Saturday and Sunday are not defined as business days in the service level agreement, there are no activities on these two days. Note that the second and third service activities are parallel tasks (they have the same step number). The system does not perform staggering for parallel tasks; therefore, both service order activities have the same planned start date and time (that is, 9:01 a.m. on Monday). In this example the two parallel tasks have different estimated task duration, so each one has a different planned end date and time, and the system takes the later one plus one minute as the planned start date and time for the next task. At the end, the technician finishes the last service activity starting at 11:32 a.m. through 12:32 p.m. on Monday.

If the total amount of estimated hours needed for all service activities exceeds the guaranteed restore time, which causes the planned end date and time of any activity to be later than the guaranteed restore date and time, the system issues a warning and sets the planned start and end dates and time of these activities to the committed end date and time.

## Situations in Which Automatic Calculation Is Unavailable

This list summarizes the conditions under which the committed start and end dates and times are not populated on a service order:

1. The service level is not available in the customer's entitlements.

2. The guaranteed response and restore times are not available in the customer's or service entitlements.

   With no response and restore times, the system cannot do any calculation, even using the activity durations.

Dates and times do not appear at the service order activity level if any of the preceding conditions occurs.

| | Example 1 | Example 2 | Example 3 |
|---|---|---|---|
| Is the guaranteed response time available in entitlements? | Yes | Yes | No |
| Is the guaranteed restore time available in entitlements? | Yes | No | Yes |
| Is the service level available in entitlements? | No | Yes | Yes |
| Will the committed start date and time be calculated? | No | Yes | No |
| Will the committed end date and time be calculated? | No | No | Yes |
| Will the planned start date and time appear at the service order activity level? | No | Yes | Yes |
| Will the planned end date and time appear at the service order activity level? | No | Yes | Yes |

**Note.** Dates and times are not automatically calculated or populated if the service level is not available in customer's entitlements and there is no default service level defined for the business unit.

## Notifications

Based on the customer preferred and committed dates and times for the service order, the escalation process sends out notifications for the service order if it is not completed by the planned end date and time. Customer preferred dates and times are considered first; if these fields are blank, the committed dates are used. In the previous example on staggered service order activities, the service order is scheduled to be completed by 12:32 p.m. on Monday, July 22. If this service order is not completed on time, the system uses the policies invoked by the Active Analytics Framework system to send out a notification for the service order indicating a missed commitment.

## How Auto Calculation is Used to Reset Dates for Activities

On the Service Order - Activities page you can use the Activity Actions group box to change the planned start and end dates, as well as times for all activities that are associated with the service.

In this situation, the system uses the autocalculation functionality to reset the planned dates and times appropriately for each activity. If no service level can be determined for the service order, then autocalculation function uses the default service level for the business unit to reset the planned dates and times.

The same is true for the new end dates, except the autocalculation function schedules the activities backwards based on the new end date and time.

### Calculating Dates and Times for Preventive Maintenance Service Orders

For service orders that are created through preventive maintenance, their committed start dates and times are processed by the automatic calculation functionality. As a preventive maintenance service order is generated, the service order start date and a default time of 12:00 a.m. are passed into the automatic calculation feature.

Automatic calculation uses these two pieces of information, along with the associated service level, to calculate the committed start date and time of the service order. Should the service order start date fall outside the period in the service level, the system adjusts the committed start date and time to the next available day and time that is covered by the service level. For instance, if the start date of the service order is July 22, Monday, and the associated service level is 8 a.m. to 5 p.m., Monday through Friday, the calculated committed start date and time becomes July 22, Monday at 8 a.m.

Similar to regular service orders, the calculation of committed end date and time for preventive maintenance service orders are based on the committed start date and time, guaranteed restore time and service level.

## Setting Up the Automatic Calculation of Dates and Times for Service Orders

To set up automatic calculation of dates and times for service orders:

• Activate the automatic calculation functionality in the system.

  Make sure the Calculate Date/Time check box is selected at the business unit level for all business units in which the functionality will be used.

• Define service entitlements.

  Service entitlements are used in the automatic calculation process when agreement or warranty entitlements are not available. You can define service entitlements for on-demand services only; the Select Entitlement link is inaccessible if the On Demand check box for the service is cleared.

### See Also

Chapter 5, "Setting Up Services," Defining Service Entitlements, page 38

Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," Defining FieldService Business Units, page 16

# Setting Up Automatic Service Order Assignments

This section provides an overview of automatic service order assignments and discusses how to enable automatic service order assignment.

# Understanding Automatic Service Order Assignments

In PeopleSoft Integrated FieldService, each service order activity is associated with at least one provider group and at least one technician, who goes out to the customer's site and performs service requests. When you create a service order and select a service or agreement on the page, the system automatically populates the service order with the provider group and technician that are defined for the associated service or agreement (values from the agreement take precedence).

But because these values are optional for services and agreements, the provider group and group member will not be prepopulated on the service order if they are not specified in the selected service or agreement. Alternatively, you can perform the assignment either by selecting the provider group and technician from the prompt lists, or as a more effective solution, by clicking the Suggest a Provider Group and Suggest Group Member buttons and letting the assignment engine determine the best recommendations for the tasks. These are, however, manual processes in which you need to click the buttons on the service order. Otherwise, no provider group or technician assignment is made when you save the page.

The system enables you to turn service order assignment into an automated process. By activating the automatic service order assignment feature at the business unit level, the system performs automatic provider group and technician assignments whenever a new service order is saved.

**Note.** Regardless of how assignments for the provider group and technician are made, you can modify the values in the Technician Assignment group box on the Activities page as long as the corresponding overall service order or service order activity status remains open.

## How Does Automatic Assignment Work

Automatic assignment uses the same assignment engine that is used by the Suggest a Provider Group and Suggest Group Member buttons. When a service order is saved, the assignment engine identifies the best suited provider group and group member for the service order and populates the values in the Provider Group Name and Technician Name fields in the Technician Assignment group box for each activity.

Automatic assignment is available only when the provider group name and technician name are left blank when the page is saved. In other words, automatic assignment will not be done for activities in which a provider group or technician already exist. For example, you may choose to assign the values manually in the service order, or the values were populated from the associated agreement or service. These values will not be altered by the automatic assignment functionality when you save the service order.

**Note.** Auto assignment only assigns the activities on the service order. The activity actions available at the header level on the Service Order - Activities page are used only if you want to apply status changes, planned date actions, and technician assignments to all lines. It has nothing to do with auto assignment.

Whether a technician assignment can be made successfully depends on several factors, such as the availability of technicians, the presence of an assigned provider group, and so on. The assignment engine observes the these rules when it automatically assigns service orders:

• No provider group is automatically assigned if the assignment engine returns no matches for provider group.

• No group member (technician) is automatically assigned if there is no assigned provider group at the same level.

  In the case when an assigned provider group is available, there is still no technician assignment if the assignment engine returns no matches for technician.

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**Note.** If the Candidate must be available check box is selected at the business unit level, the assignment engine considers only provider groups and group members that are available during the time the service is performed. Assignments are also based on work schedule. No automatic assignment is made if this check box is selected and no provider group or technician is available. In this case, you must uses the technician's calendar to determine availability.

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• You can assign a technician to a service order, regardless of the committed start and end dates.

The service order, however, is written only to the technician's calendar when planned start and end times are specified. Also, if you configured the system to search for assignment candidates based on availability, the planned start and end dates and times must be specified to determine the availability of the provider groups and group members.

• For any service activity that requires multiple technicians, the same number of technicians with the highest fit scores in the search results are selected and assigned to the corresponding activity.

However, if the service activity requires only one technician and more than one candidate is qualified for the assignment, the one with the best fit score is assigned to the activity. Also, if there are not enough qualified technicians, the service order activity is saved with fewer technicians than are required. If the number of technicians for the line's specific activity is zero, then no automatic assignment is made for that line.

After a technician has been automatically assigned to a service order activity, the system changes its status to *Assigned.*

## See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches," Understanding Assignment Searches

# Enabling Automatic Service Order Assignment

To enable the automatic assignment of provider groups and group members on service orders:

• Activate the automatic assignment feature in the system.

Make sure the Automatic Assignment at save check box is selected at the business unit level for all business units in which the functionality will be used.

• (Optional) Decide whether candidates need to be available for the task when the assignment engine suggests eligible candidates to assign to a service order.

Select the Candidate must be available check box if you want the assignment engine to consider only provider groups and technicians that are available at the time requested on the service order.

## See Also

Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," Defining FieldService Business Units, page 16

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Defining Holiday Schedules," Understanding Holiday Schedules

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Using Calendars," Understanding Calendars

# Setting Up Service Order Assignment Notifications

This section provides an overview of service order assignment notifications and discusses how to set up assignment notifications.

**Note.** In addition to PeopleCode, PeopleSoft Integrated FieldService leverages Active Analytics Framework (AAF) to trigger workflow actions and send notifications. Use AAF to set up workflow processing, which includes setup contexts, terms, and policies. When the conditions that are defined in policies become true, associated workflow actions are triggered automatically, and corresponding notifications are sent to assigned recipients.

## Understanding Service Order Assignment Notifications

You can enable workflow policies for service order assignment to notify affected provider groups and group members when a service order is assigned and when the service order assignment is changed. Notifications to the provider group and the assigned group member are triggered when you make a new assignment, when you reassign a previously assigned service order activity, and when you delete an assignment. If you select the Use Members to Broadcast check box on the Provider Group page, assignment notifications are also sent to all members of the provider group, which means that the assigned group members receive two notifications for each trigger event.

When a service assignment is accepted or rejected or when a service order activity is canceled, assignment workflow policies also send notification messages to the person who created the service order—that is, the person whose user ID is listed in the Entered By field on the service order.

You can publish notifications as worklist entries, emails, or both, depending on the user profile of the person receiving the notification and other system settings. Email notifications provide a link to the service order where the notification trigger event occurred.

As delivered, the system offers these workflow policies for service order assignment notifications. All the policies are triggered by saving the service order after an assignment is made or after the status is changed to assigned. Notifications are triggered for each service order activity line that is affected.

### Service Order Assignment Workflow

This workflow policy sends an email and worklist entry to the affected provider groups and group members when the service order is assigned for the first time.

### Service Order Assignment Change Workflow

This workflow policy sends an email and worklist entry to the affected provider groups and group members when a service order activity assignment is changed from one technician to another.

### Service Order Activity Cancellation Workflow

This workflow policy sends an email and worklist entry to the assigned provider groups and group members on a service order activity when the line's status is changed to *Canceled.*

### Service Order Assignment Accepted Workflow

This workflow policy sends an email and worklist entry to the creator of the service order when any service order activity status values are changed to *Accepted.*

### Service Order Assignment Rejection Workflow

This workflow policy sends an email and worklist entry to the creator of the service order when any service order activity status values are changed to *Rejected*.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members"

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow"

# Setting Up Assignment Notifications

To set up notification workflow for service order assignment:

1. Associate worklist groups with each provider group.

   When you make or modify a service order activity assignment, you can create a worklist entry for the worklist group that is established for the provider groups that were affected by the assignment or assignment change. Define worklist groups on the Worklist Groups page, and then associate them with a provider group on the Provider Group page.

2. Define an email address for the provider group.

   The system can also send assignment notifications to an email address representing the provider group. Enter an appropriate email address for the provider group in the Email Address field on the Provider Group page.

3. Specify whether to send assignment notifications to each member of the provider group.

   You can send assignment notifications to each member of the provider group. Select the Use Members to Broadcast check box on the Provider Group page. Each member of the provider group will receive a notification when an assignment or an assignment change affects the provider group. The notification is published as a worklist entry, an email, or both, depending on the routing preferences for the group member on the Workflow page of the User Profiles component.

4. Define valid email addresses for the people who receive email notifications.

   Define primary email addresses for provider group members and service order creators.

   **Note.** Workers' person IDs are associated with user IDs on the User Profile page under Workforce, Worker or on the ID page under PeopleTools, Security, User Profiles. For workflow notifications to function properly, each person in the system should be linked to only one user ID.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Understanding Correspondence and Notifications"

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Understanding Correspondence and Notifications," Automated Communications

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members"

*Enterprise PeopleTools PeopleBook: PeopleTools Security Administration*

# Setting Up Service Order Escalation Notifications

This section provides an overview of service order escalation notifications and discusses how to set up escalation notifications.

## See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Run Time Delay Notifications

## Understanding Service Order Escalation Notifications

Workflow rules for service order escalations notify the creator of the service order (the person whose user ID is listed in the Entered By field on the service order) when the service order has not been processed within a set period. Escalation messages are triggered when a specific condition is not met at a system-defined point in the time period that is defined by the customer preferred start or end time on the service order, if available; otherwise, the system uses the committed start or end time on the service order.

As delivered, the system offers the following workflow rules for service order escalation notifications. These rules are triggered automatically if the described conditions are met.

**Note.** You can use the Run Time Delay setup page to send multiple notifications at intervals that are determined at run time.

### Service Order Not Started Workflow

The system schedules a process to check the service order timelog at two time points equal to 100 percent and 120 percent of the required processing period, defined by the service order creation date and the customer preferred dates (if they are available) or the committed dates on the service order. If there is no timelog entry, the system sends a message to the service order creator.

Using the Run Time Delay setup page, however, you can use *terms* to represent the number of minutes for which the system should delay a notification. The Select Term link takes you to a term search page. Selecting a *term* causes the AAF notification process to use the term instead of a record/field definition. The *term* contains a number, which represents the number of minutes for which the system should delay the notification.

**Note.** Make sure that you select a numeric term that represents the delay minutes. The system makes all terms available for selection - strings, dates, an so on. Do not pick a non-numeric term. Also, there is no rescheduling functionality available in AAF.

### Service Order Not Assigned Workflow

The system schedules a process to check the service order assignment at three time points equal to 20 percent, 50 percent, and 100 percent of the required processing period, defined by the service order creation date and the customer preferred dates, if they are available, or the committed dates on the service order. If no technician is assigned to the line, the system sends a message to the service order creator.

### Service Order Not Completed Workflow

The system schedules a process to check the service order activity status at two time points equal to 80 percent and 100 percent of the required processing period, defined by the service order creation date and the customer preferred dates, if they are available, or the committed dates on the service order. If the service order status is not set to *Completed, Closed,* or *Canceled* at either point, the system sends a message to the service order creator.

### Service Order Response Time Exceeded Workflow

When the service order status is set to *closed*, the system compares the earliest date and time in the time log with the customer preferred time (if it exists); otherwise the system uses the committed time. If the earliest date and time found in the timelog is later than the committed (or customer preferred) start date and time, the system sends a message to the service order creator.

### Service Order Restore Time Exceeded Workflow

This rule is identical to the Service Order Response Time Exceeded workflow definition, except that it uses the latest date and time in the timelog.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow"

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up Business Projects"

# Setting Up Escalation Notifications

To set up service order escalation workflow:

1. Activate the AAF Policy.

   Select Enterprise Components, Active Analytics Framework, Policies, Manage Policies.

2. Define notification routing preferences for the people who enter service orders.

   On the Workflow page under PeopleTools, Security, User Profiles, indicate whether the person is a worklist user, an email user, or both. If you select both the Worklist User and Email User check boxes, two notices, an email and a worklist entry, are sent each time a workflow process is triggered for that person.

3. Define valid email addresses for the people who receive email notifications.

   **Note.** Worker's person IDs are associated with user IDs on the User Profile page under Workforce, Worker or on the ID page under PeopleTools, Security, User Profiles. For workflow notifications to function properly, each person in the system should be linked to only one user ID.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Correspondence Management"

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Contacts"

*Enterprise PeopleTools PeopleBook: PeopleSoft Security Administration*

# Managing Service Orders

This section provides an overview of when service order fields cannot be modified, lists common elements, and discusses how to:

- Enter or modify service orders.

- Enter information related to specific activity lines.

- View required materials.

- Use solutions to resolve problems.

- Track time, material, and expenses associated with a service order.

- Add notes and attachments.

- Record billing information.

- View interaction history.

- Insert related objects.

## Understanding When Service Order Fields Cannot Be Modified

Your ability to edit fields on the service order header depends on whether the service order has been saved, how you access the Service Order component, and whether the service order is covered by an agreement or warranty. This table lists the conditions that prevent changes to specific fields on the service order:

| Condition | Service Order Fields That Cannot be Updated |
| --- | --- |
| You save a service order. | Customer, Service ID, and Case ID. |
| You select an agreement in a service order. | Site Name, SIN (site identification number), Product ID, and Serial Number. |
| You select a warranty in a service order. | Product ID and Serial Number. |
| You create a service order from a case. | Product ID, Site Name, Serial Number, and Case ID.<br><br>**Note.** The Product ID and Serial Number fields are not editable if values are passed into them from the case. |

## Common Elements Used in This Section

**Committed Start Date, Committed Start Time, Committed End Date,** and **Committed End Time**

Committed dates are generated by entitlements. Committed dates are never available for update. They are read-only.

If the automatic service order date and time calculation feature is enabled for the business unit, the committed date and time fields are calculated and populated automatically in the Dates and Times of Service group box on the Service Order page, and the planned dates and times are populated at the activity line level on the Activity page.

For service orders that have multiple activity lines, these values stagger at the activity line level based on the estimated duration of the associated service activities. Parallel tasks (activities with the same step number) have identical

planned start dates and times; they have different planned end dates and times if their task durations are different.

The system uses this date and time information to trigger workflow processes that enable you to monitor and escalate service orders for which work has not begun on time and to manage service orders for which the customer's guaranteed response time has been exceeded.

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**Note.** The system initiates workflow processes based on the dates on the service order header (committed and preferred) versus the activity level. Planned start and end dates and times are used to populate the assigned technician's availability calendar. You may assign a technician manually, but the system doesn't write the information to the calendar until a user enters the dates.

---

| | |
|---|---|
| **Customer Preferred Start Date, Customer Preferred Start Time, Customer Preferred End Date,** and **Customer Preferred End Time** | Enter the dates and times when the work on the service order must begin and finish, based on the customer's request. Customer preferred dates are never automatically populated. They are always entered and are available only for update on the Service Order page, not on the My Service Order page. |
| **Planned Start Date, Planned Start Time, Planned End Date,** and **Planned End Time** | Planned dates and times are populated at the activity line level on the Activity page if the automatic service order date and time calculation feature is enabled for the business unit. |

## Pages Used to Enter and Update Service Orders

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Service Order | RF_SERVICE_ORDER | • FieldService, Add Service Order<br><br>• FieldService, Search Service Orders<br><br>• To add a service order to a PeopleSoft Support case, access the Related Actions page of the PeopleSoft Support Case component. Select an action of Create Service Order, and click the Go button. You may need to select a service and possibly reselect an agreement before clicking Go.<br><br>• When a service order is related to a PeopleSoft Support case, click the Details link for the service order on the Related Actions page.<br><br>• From the Customer 360 page, select an action of Add Service Order, and click theGobutton. | Create or review service orders. |
| Activities | RF_SO_ACTIVITY | FieldService, Add Service Order, Activities | Enter detailed information about a service order activity. |
| Required Material | RF_MAT_REQUIRED | FieldService, Add Service Order, Required Material | Lists all items and their quantities ordered and received for the service. You can also view item availability and balances. You can't view this page, however, until the service order is saved. |
| Solutions | RF_SO_SOLN | FieldService, Add Service Order, Solutions | Locate information to troubleshoot problems as well as search for and suggest solutions that are associated with the service order. |

| Page Name | Object Name | Navigation | Usage |
|-----------|-------------|------------|-------|
| Time Material Expense | RF_SO_TIME_MAT_EXP | FieldService, Add Service Order, Time Material Expense | Record time, material, and expense information for the service order.<br><br>**Note.** You cannot log time, material, and expense entries against a service order until the service order has been saved and assigned. |
| Notes | RF_SO_NOTE2 | FieldService, Add Service Order, Notes | Add notes and attachments to the service order. |
| Billing | RF_SO_BILL_DET | FieldService, Add Service Order, Billing | Record, update, or view a customer's billing information for a service order. When the status of the service order at the header level is set to *Closed,* the information on this page is display-only. |
| Interaction History | RF_INTERACT_HIST | FieldService, Add Service Order, Interaction History | View interactions associated with the service order. |
| Related Objects | RF_ASSOCIATION | FieldService, Add Service Order, Related Objects | Add business object and branch scripts to the service order. |

# Entering or Modifying Service Orders

Access the Service Order page.



Service Order page (1 of 2)

Service Order page (2 of 2)

Access the toolbar and view the service order header information at the top of the Service Order page. When you create a service order, all sections on the Service Order page expand.

## Customer Information

These fields provide header-level information for the service order. If you create a service order from the PeopleSoft Support Case component, the system automatically populates these fields by using the data that is entered for the case.

| | |
|---|---|
| **Customer** and **Contact** | Click the Search button to access the Search for Sold To Customer page, where you can search for an existing company or consumer record in the system, or create a company, company with contact, consumer, or consumer with contact by using the Quick Create feature. |
| | You can also enter the name of the company or consumer requesting service and then click the Search button. On the search page, you can select both the name of the customer and a contact. |
| | Click the Customer link to access the record of the selected company or consumer. |
| **Anonymous Caller** | Select to use an anonymous user as the customer for the service order. The system populates the Customer field with the value that the administrator has specified for an anonymous user, and you cannot edit the Customer field until you clear this check box. No change regarding the use of an anonymous user is allowed after the service order is saved. |

|  | This check box is invisible on the Service Order page if you clear the Allow Anonymous User check box on the service order configuration template that is used by this business unit. |
|---|---|
| **First Name** and **Last Name** | Enter the name of the person who placed the service request. If you enter the name of a contact first and click the Search button, the system automatically populates the customer, site name, and address information. |
|  | Click the directory Search button to access the Search for Sold To Customers page, where you can search for an existing contact record in the system, or create a company's contact or consumer's contact by using the Quick Create feature. |
| **Phone** | Enter the phone number of the contact. |
| **Postal** | Enter the postal code of the consumer or customer. |
| **Alternate Phone** | Enter an alternate phone number of the consumer or customer. This field is for information only and is saved only with the transaction, not in the customer's record. |
| **Site Name** | Enter the site where the requested service will be performed. Multiple sites can be associated with each customer. To add a new site for a customer, click the Transfer to Site button to access the Site component. |
| **Address** | If you select a customer that is associated with a primary ship-to address (specified in the Customer record), the system automatically populates this field with that address when you select the customer. Later, if you select a site and this site is also associated with a primary ship-to address (specified in the Site record), the system populates this field with that address and overwrites any current address. |
|  | If there is no primary ship-to address associated with the customer or site that you select, the system uses the customer address. |
| **View Address** | Click this link to access the Address Information page, where you can view the address where the requested service will be performed. |
| **SIN** (site identification number) | Enter the site identification number that is associated with the selected site. You assign a SIN to a valid site through the Agreement component. |
|  | This field is not shown on the Service Order page if you clear the Show SIN check box on the service order configuration template that is used by this business unit. |

## Incident Address

Enter information about the location of the incident. The section does not appear if you clear the Allow Incident Address check box on the service order configuration template that is used by this business unit.

| **Edit Address** | Click the link to access the Incident Address page and specify the location of the incident if it is different from the customer address. You can enter either a street address or the intersection for the incident. Click the Create Using Entered Address button on the Incident Address page to populate the address on the section. |
|---|---|
| **Additional Detail** | Enter additional information about the location by using free-form text. |

## Service Details

| | |
|---|---|
| **Problem** | Use this free-form field to enter any additional information about the service or problem. If the service order is created from a case, the system enters the problem from the case. This field is positioned before the service information because you may need to record additional information before the service can be determined. |
| **Service ID** | Select the requested service. Services must first be established in the system by using the Service component. The system automatically creates service order activities that have been defined on the service template. |
| | You can modify the service order activities and add additional lines for other service activities. |
| **Product ID** | Enter the product ID that requires service. Before you can specify a product ID, the product must be established in the system. |
| | If you enter a product ID that is associated with more than one installed product, the system displays the Installed Product List page, where you can select the applicable installed product. |
| | The Product ID field and its associated prompt and transfer buttons are invisible on the Service Order page if the Hide All Product Information product display option is selected on the service order configuration template that is used by this business unit. |
| **Serial Number** | Enter the serial number of the product that requires service. If you enter a serial number of an installed product that does not have a status of *Uninstalled,* the system automatically populates the service order with the information from that installed product, including the customer, product ID, and site name–if they do not already exist in the service order. |
| | To add a new installed product, click the Transfer to Installed Product button to access the Installed Product and Service page. |
| | The Serial Number field and its associated prompt and transfer buttons are invisible on the Service Order page if either the Hide All Product Information or the Prompt for Product Master, Hide Install Product Information product display option is selected on the service order configuration template that is used by this business unit. |
| **Priority** | Select the current priority that is associated with the service order: *Low, Normal, High,* or *Urgent.* You can also design notification processes based on these priorities by using the workflow features in PeopleTools. By default, new service orders have a normal priority, and new service order activities reflect the priority of the service order header. |
| | **Note.** You can configure the dispatch board to display service orders or use AAF to initiate workflow processes by adding your own terms and policies that trigger actions based on service order priority. |
| **Installed** | Indicates that the selected product is also an installed product. This check box is visible on the Service Order page only if you select the Prompt for Product Master, Show Installed Product Information product display option on the service order configuration template that is used by this business unit. |

| | |
|---|---|
| **Case ID** | Enter the ID of a support case that you want to associate with the service order. |
| | When you create a service order and associate it with a case, the PeopleSoft CRM system records the service order creation on the Related Actions page of that case. If you create a service order from the Related Actions page of the case, this field is automatically populated with the associated case number. |

**Note.** If you select a case ID in the service order in which a customer is not yet selected, the lookup prompt displays all cases where the call center business unit is identical to the service order's business unit. If a customer is selected in the service order, the case lookup prompt displays all cases (for that customer) where the Customers record group of their call center business unit is associated with the same setID as the Customers record group of the field service business unit. For example, business units US200 and US300 use the same set of customers that are defined for the CRM01 setID. If you create a service order under US200 and select *ABC Inc* as the customer, clicking the case lookup displays all cases under US200 and US300 that are opened for ABC Inc. Access the Record Group page to view the tableset control settings of business units.

| | |
|---|---|
| | See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls. |
| **Billable** | The system automatically selects this check. You can clear it, however, if you don't do billing. This check box controls the pricing of the service fee. |
| | Neither the Billable check box nor the Billing tab appear on the Service Order page if you clear the Show Billing Information check box on the service order configuration template that is used by the business unit. |
| **Select Agreement or Warranty** | Click to perform an entitlement search for the new service order. The system uses the information in the Customer Information group box to perform the search. If there is only one agreement or warranty found on the search, it's automatically populates the Entitlements section on the page. |
| | If more than one agreement line or warranty matches the search criteria, the Entitlement Match page appears, enabling you to select the applicable agreement line or warranty. |
| | When you click OK on the Entitlement Match page, the system populates the name of the selected agreement or warranty and its entitlement items in the Entitlements group box. In addition, the system populates the service order with the service from the agreement line. It also populates the committed start and end dates and times when the automatic service order date and time calculation feature is enabled at the business unit level and the entitlements that are needed for the calculation are available. The system also populates the planned dates and times of the activities if autocalculation is turned on. |
| | Once you save the service order, you cannot select another set of entitlements for the service order. You can, however, navigate to the actual agreement or warranty or view the entitlements right from the Service Order page. |
| | For entitlement searches that are performed from the service order, the system considers only agreements with a scope of site. |

> **Note.** When creating a service order from a case, the agreement or warranty on the case is also the agreement or warranty specified on the newly created service order. The agreement from the case may, however, not be applicable to the service being performed.
>
> From the Related Actions drop-down list box on the Case page, select *Service Order* to access the Create Service Order page, and then select the appropriate agreement or warranty.

## Entitlements

This section lists entitlements that are associated with the selected agreement, warranty, or service and their details as defined on the Entitlements page.

This information does not appear if you clear the Show Agreement Information check box on the service order configuration template that is used by this business unit.

> **Note.** If entitlements are tied to the service, they still appear regardless of the configuration template.

## Dates and Times of Service

There are two sets of dates and times that apply to the entire service order.

They are the committed dates and times and the customer-preferred dates and times. The committed times are based on the service level for the entitlements that are defined for the agreement or warranty or service.

The customer-preferred dates and times are not required and are not automatically populated. You may change these values if the customer wants to specify a date and a time that are different from the committed date and time.

> **Note.** The only entitlement defined at the business unit level is service level, which doesn't generate the committed dates and times. These values are display-only.

| | |
|---|---|
| **Start Date, Start Time, End Date,** and **End Time** | If the customer prefers dates and times for the service that are different from the committed dates and times, enter them in these fields. The committed dates appear only and are based on the contractual agreement that you have with the customer. |
| | **Note.** The system uses the committed dates and times to calculate a set of planned dates and times for the activities that are related to the service. The system automatically calculates dates and times for activities from the committed dates and times, not the customer preferred dates. You can change the planned dates on the Activities page using the date and time fields within the Activities Actions group box on the Activities page. |
| | If customer-preferred dates and times exist, the system does not send workflow if the committed dates and times are not met. |

## Approval Information

The system displays this information conditionally based on the service order configuration.

| | |
|---|---|
| **Approval Required** | Select to indicate that a service order must be manually approved before any of the service order activities can be approved. The default value for this |

setting is specified when the service is defined in the Service component.
If the definition requires approval, approval status must be manually set
to *Approved* on the service order.

| | |
|---|---|
| **Approval Status** | Select the current approval status of the service order. If the Approval Required check box is selected, you must manually change the value from *Pending* to *Approved.* When the approval status is changed to *Approved,* you cannot modify the field. |

**Note.** If the service order requires approval, the status of the service order
header cannot be changed to *Completed* or *Closed* until the approval status
is set to *Approved.*

| | |
|---|---|
| **Approved By** and **Approval Date** | These fields are automatically populated based on who is logged in. They are display-only fields. |

### See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Tracking Installed Products and Assets"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Setting Up Products"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Performing Entitlement Searches for Cases and Service Orders"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members"

## Entering Information Related to Specific Activity Lines

Access the Activities page.

Activities page (1 of 3)



Activities page (2 of 3)

Activities page (3 of 3)

## Dates and Times of Service

For reference purposes, the system displays the dates and times of service from the Service Order page. You can, however, enter new dates and times in the customer-preferred fields to update the dates and times on the service order.

## Activity Actions

This section is collapsed upon entry to the page. It is used to apply changes to all activities at once. If there is only one activity on the service order, then this section does not appear.

| | |
|---|---|
| **Change Status** | Select a value and then click the Apply Changes button to change the status for all activities. |
| **Planned Date Actions** | Use this section to update the dates and times on all activities. You may select only one of the five listed options. To specify a new planned start or end date and time, select either the Use New Start or Use New End option, enter the date and time, and then click the Apply Changes button. |
| | The automatic calculation functionality resets the planned dates and times for the activity appropriately. If no service level can be determined for this service order, then the automatic calculation uses the default service level for the business unit to reset the planned dates and times. The same is true for the Use New End Date option, except that the automatic calculation schedules the activities backwards based on this end date and time. |
| | If you entered a customer-preferred date and time, you may update the planned dates and times by selecting either the Use Customer Preferred Start Date option or the Use Customer Preferred End Date option and clicking the Apply Changes button. The planned dates and times are calculated as described previously, except that the customer-preferred start or end values are used instead of the new planned values. |

**Technician Assignment**    Use this section to change the assignment on all activities. By first selecting a provider group, you can use the assignment engine to choose multiple technicians or a provider group. You can also click the Add Technician button to manually add a new technician. If you run the assignment engine after specifying technicians, the new technicians are appended to the list of previously specified technicians. Click the Apply Changes button to add the technician to all activities. If there are no provider groups or technicians listed in the grid, then no changes are made to the activity assignments.

**Important!** Note that when you reassign service orders, the system does not reassign any service order lines that have time, material or expense associated with those lines.

## Activities

This group box lists the step numbers, planned start dates and times, planned end dates and times, and statuses for each activity that is part of the service. You can also use this section to add assignments and reassign technicians.

The fields in this group box list the group members (and their corresponding provider group) that have been assigned to perform the work on the service order activity. You can assign multiple technicians to perform the work from the same or from different provider groups.

    Click the Expanded button to view additional information for the individual activity.

**Approval Information**    If you are using approvals, the technician assigned to the line must be able to see if the activity has been approved before starting the activity. Therefore, if the activity has not been approved, the activity line has a status of *Pending Approval,* and the only fields that the technician can change are the planned start dates and times, end dates and times, and priority. This is true, however, for the My Service Orders page only.

**Search Provider Group**    Click the Search Provider Group button to locate a provider group for the activity. This field is used when clicking the suggest group member button.

    Click the Suggest a Provider Group button to select from a subset of provider groups on the Provider Group Summary page that is derived from information on the service order.

    Click the Suggest Group Member button to select from a ranked listing of qualified, available technicians on the Candidate Summary page. You must select a provider group before you can generate a candidate list.

**Provider Group Name**    Enter the name of the provider group that will perform the requested service work. This field is initially populated with the default provider group that is defined in the selected agreement line (if available) or in the specified service.

Provider groups must first be established on the Provider Groups page. Click the Lookup button to access the Provider Groups component.

**Technician Name**    Enter the name of the provider group member (technician) who will perform the requested service work. This field is initially populated with the default group member that is defined in the selected agreement line (if available) or in the specified service.

Group members must first be defined on the Provider Groups or Provider Group Members page. Click the Lookup button to access the Provider Group Members component.

**Lead Technician**            Select to indicate that the group member in the Technician Name field of the row is the technician who is responsible for the service order activity. By default, the first technician associated with the line is the lead technician.

---

**Note.** The system requires that you to have one lead technician. You cannot have more than one lead technician for an individual activity.

---

**Add Technician**            Click to add a new technician to the activity.

# Viewing Required Materials

Access the Required Material page.



Required Material page

Based on the service definition for the service order, this page automatically populates all the items and their quantities ordered and received for the service. The quantity needed comes from the service order. However, the quantities ordered and received come from data entered in the Order Materials component or from the service order material usage for auto-receiving.

**Item ID**                   Displays the item that is required to perform the service activity. The system displays the description of the selected item next to this field. Items are established in the system tables by using the Item Definition page or the Item Master EIP.

**Quantity Needed**           Displays the quantity from the service definition. If no activities are defined for the service, then the item information comes from the Service Details component.

                              If activities are defined for the service, then the item information comes from the service activity.

                              If one item is needed for more than one activity, then the total quantity for all the activities appears.

**Quantity in Truck**          Displays the quantity in the technician's good storage location. The quantity is from the good location of the lead technician on the service order.

This information is stored in PeopleSoft Inventory. Therefore, if the integration to Inventory is disabled, then the information in this column does not appear.

If the integration is enabled, the system populates the quantity in this column through an EIP with Inventory.

**Check Availability**          Click this link to access the Service Order - Item Information page and navigate to the item. From this page, you can transfer to the Item Definition or Item Substitutes page. Or, you can view item availability and balances. Item availability and balances information comes from PeopleSoft Inventory. Item definition and substitutes information is contained within the PeopleSoft CRM database. The system does not need to get information from PeopleSoft Supply Chain Management.

**Quantity Ordered**          Displays any previously ordered quantity for the item on this service order. If the item is on more than one activity, the system displays the sum of all the ordered quantities for the item.

**Quantity Received**          Displays any previously received quantity for the item on this service order. If the item is on more than one activity, then it is the sum of all the received quantities for the item.

**UOM** (unit of measure)          Displays the standard unit of measure for the item quantity.

### See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Checking Item Balances and Availability"

## Using Solutions to Resolve Problems

Access the Solutions page.

Solutions page

Use the Solutions page to search for and suggest solutions that are associated with the service order.

### See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Solution Management"

# Tracking Time, Material, and Expenses Associated with a Service Order

Access the Time Material Expense page.

Time Material Expense page (1 of 2)



Time Material Expense page (1 of 2)

---

**Note.** You cannot log time, material, and expense entries against a service order until you save the service order and it has been assigned.

---

| | |
|---|---|
| **Technician** | The system displays this field if more than one technician is assigned to the service order. The field contains all the names of the technicians who are assigned to this service order. If you select a technician, the system displays only the time entries for the activities that are assigned to that technician. To view everything, choose *All Technicians.* |

## Time

Enter date and time details for activities that were performed to fulfill the requirements of the service order.

| | |
|---|---|
| **Type** | Use this field to categorizes the time that you are entering. Values may include: |
| | *Activity:* Select to enter time that is spent on any one of the activities or on the entire service order. |

*Break:* Select to enter the time that the technician spent on break.

*Travel:* Select to enter the time that it took the technician to travel to and from the site.

*Wait:* Select to enter the time spent waiting for the customer or other technicians (when no work was being performed).

---

**Note.** Time types are customer definable. The field values shown are examples. To define your own time types, select Set Up CRM, Product Related, FieldService, Time Type. You can then override the billable flag at the business unit level. There is a billable setting for each of these time types on the FieldService Definition - Billing Options page. If the time type billable flag is not selected, then the prepaid quantity on the agreement is not decremented.

---

| | |
|---|---|
| **Activity** | Select the activity for which you want to record time. This field should contain all the activity names on this service order. If you are recording time for the entire service order, select *All Activities.* If there is only one activity and the activity name is blank, the system displays the name of the service. If you add a new activity to the service order, the system displays the new activity as well. |
| **Technician** | Select the name of the technician for whom you are entering time. |
| **Billable** | Select this check box if the time is billable to the customer. |

---

**Note.** The system may automatically select this check box if the Billable check box is selected for the time type at the business unit level.

---

| | |
|---|---|
| **Duration** | Displays the difference between the start and end of the time entry. The system displays a grand total at the bottom of the page. |
| **Time Entry Tab** | Select this tab to enter the start date and time and the end date and time for the activity. |
| **Comments** | Enter any comments about the time that you are entering. |
| **Copy Planned Times** | Click to copy the existing activities and their planned times into the time log. Use this feature to reduce data entry if the actual time is the same as the planned time. If there are any variations in the planned and actual times, you can update or delete the entries and add new entries. |

## Material

Record any material that is used or removed for the service order. If you selected auto-receiving during installation, the system records materials that are not used, so that the entire receipt quantity can be recorded.

| | |
|---|---|
| **Usage Details** | Use the fields on this tab to record information about the materials that were used for the activities on the service order. After you select the activity and item, use the Action field to indicate if the item was removed, used, or not used. You can also record quantity, the item's serial ID, lot ID, and if the material usage is billable. |
| **Receipt Details Tab** | Select this tab to view or enter the purchase order number, line number, interunit order ID, and interunit order line information for the item. |
| **Failure Code Tab** | Select this tab to choose a failure code for any part or item that is not operational. |

> **Note.** Failure codes are not valid if you select *Used* as the action when you are recording material usage.

| | |
|---|---|
| **Item Type Tab** | Select this tab to view whether the item is serviceable, returnable, or consumable. |
| **Technician Tab** | Select the name of the technician who performed the action. You can select any technician that is assigned to the service order. |

### Expense

Use the Expense group box to record expense information that is associated with performing the work for the service order.

| | |
|---|---|
| **Summary** | Use this tab to enter expense information that was incurred by the technician, including the expense type, amount, and currency. |

> **Note.** Enter the total amount for mileage, not the amount per mile. Also, you must record expense information for the entire service order. You cannot record expense information for an individual activity.

| | |
|---|---|
| **Description** | Select this tab to enter a description and a comment for each expense item. |

## Adding Notes and Attachments

Access the Notes page.

To enter a note that is specific to a service order activity, select the corresponding activity from the Associated Activity drop-down list box.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments".

## Recording Billing Information

Access the Billing page.

Billing page (1 of 2)


Billing page (2 of 2)

This page serves multiple purposes. It enables a user with a manager role to view billing information, purchase order numbers, and credit card authorization information for the service that is performed at the customer site. It also enables users to view subtotals for all fees, apply adjustments, recalculate totals, and view the billable amount in the customer or field service business unit currency.

### Billing Information

If you selected an agreement for the service order, the system populates this group box with information from the bill to customer on the associated agreement.

| | |
|---|---|
| **Bill to Customer** | Select the customer that should be billed for the service. |
| **Bill To Contact** | Select the contact that should be billed for the service. |
| **Bill To Address** | Select the customer address to which the bill should be sent. |
| **Bill Currency** | Select the currency that the customer is using for the transaction. |

The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice.

## Payment Information

| | |
|---|---|
| **Purchase Order** | Enter the customer-provided purchase order number. |

**Note.** This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice.

| | |
|---|---|
| **Invoice** | Select if the customer intends to pay for the service by invoice. |
| **Payment Terms** | If you selected the Invoice option, use this field to select the billing cycle for the invoice (for example, *NET30 - Due in 30 days*). The payment terms appear on the invoice that is sent to the customer. |
| **Credit Card** | Select if the customer intends to pay for the service by credit card. The system displays the Credit Card Information link after you select this option. |
| **Credit Card Information** | Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month, and year. The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page. |

**Note.** You can integrate credit card information with Cybersource, a third-party taxware vendor.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook, "Setting Up the Credit Card Interface"*

| | |
|---|---|
| **Tax Parameters** | Click this link to access the Tax Parameters page, where you indicate whether the customer is exempt from taxes. If the customer is tax-exempt, enter the exemption certificate number and tax code that the customer supplies to you. |
| | The system uses a default tax code based on the customer's address, but you can override it by choosing another value. |

## Billing Details

The system uses all billable fees for time, materials, and expenses that were entered on the Time Material Expense page. Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system does not calculate the new total price using with the adjustments until a user clicks the Recalculate Totals button. The system then calculates the sum of all lines, including those that have changed, and provides the recalculated amount in the Total Amount field.



Click the Expanded button to the left of the Fee column to view all billable amounts that were included in the price for a given fee.

| +/- | Select the plus sign (+) to indicate a positive adjustment to the price or the minus sign (-) to indicate a negative adjustment to the price. |
|---|---|
| **Adjustment** | Enter either a dollar amount or a percentage value. |
| **Type** | Select *Percent* or *Amount.* |
| **Reason** | Select the reason for the adjustment. These values are user-definable. The PeopleSoft system delivers this feature without any values. |
| **Other** | If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page, where you can enter a unique description of the reason. |
| **Extended Price** | This value is calculated when you click the Recalculate Totals button. The system sums the total of the price, plus or minus any adjustments. |
| **Recalculate Totals** | Click this button any time there is a change to the Billing Details grid that impacts the price or the currency code. The system recalculates the total cost of the fees. |
| **Clear Adjustments** | Click this button to clear all adjustments that were made and return to the original total amounts. |

# Viewing Interaction History

Access the Interaction History page.



Interaction History page

This page displays the summary information of all interactions that have been created for the service order.

PeopleSoft Integrated FieldService supports ERMS (Email Response Management System), the framework that is used in PeopleSoft CRM to receive, classify, route, answer, and respond to a customer's emails in a timely and professional manner.

PeopleSoft Integrated FieldService customers can send service order status inquiries in the form of structured (web form) and unstructured (free-form) emails. Regardless of how these requests are answered, either through auto-response by the system for structured emails or manual response by customer service representatives for unstructured emails, the system creates interactions for inbound and outbound email messages that are received and delivered during the process on the 360-Degree View. These interactions are also listed on the Interaction History page.

Click the Go To Interaction Detail button to access the corresponding interaction, a correspondence (View Correspondence page), an outbound email (Outbound Email page), or an interaction (Interaction page).

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Interactions," Viewing Interactions

## Inserting Related Objects

Access the Related Objects page.



Related Objects page

You can add multiple branch scripts, but only one business project, to a service order.

### Related Action Summary

The system displays all objects that are associated with the service order in this grid.

Click the Details button to open the corresponding object.

**Relate New Object**    Select an object, *Business Project* or *Troubleshooting Guide Script,* to associate with the service order.

If you added a branch script to a service, the system automatically populates the script for service orders that are created for that service.

**Note.** You can enter one business project per service order.

**Go**    Click to access the Use Troubleshooting Guide or Use Business Project page, where you select the business project or troubleshooting guide that you want to associate with the service order.
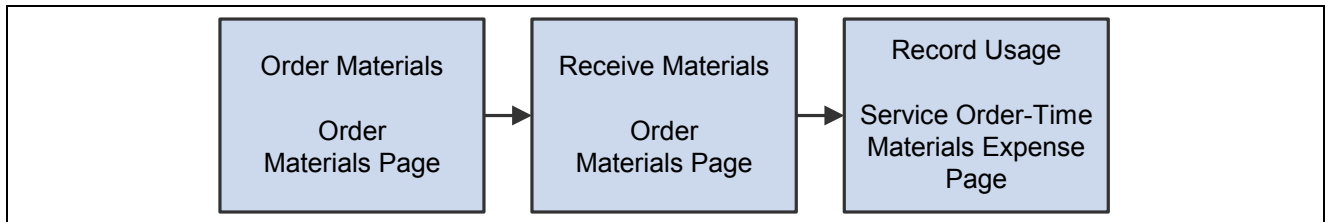
# Ordering and Receiving Materials

This chapter provides an overview of material management transactions and discusses how to:

• Set up the Order Materials component.

• Manage materials.

• Set up, view, and record material usage from the service order.

## Setting Up the Order Materials Component

This diagram illustrates the business process flow for ordering, receiving, and reporting usage of materials used for service orders when auto receiving is turned on. If autoreceiving is turned on, the receipts are derived from the sum of the used and non-used material reported.



Business process flow for ordering, receiving, and reporting material usage

Before you can use the Order Materials component, set up your PeopleSoft CRM system and your inventory and purchasing systems to support the order materials functionality.

To implement the Order Materials component:

1. Define inventory and purchasing business units.

   Define business units in the inventory system to represent field service trucks and distribution warehouses. Define the purchasing business units that will process requisitions for materials that are required to complete service orders.

   Activate the Business Unit enterprise integration point (EIP) to automatically insert business units that are defined in your inventory system and purchasing system in the BUSINESS_UNIT_FS table in PeopleSoft CRM. This enables you to reference the appropriate inventory business unit in PeopleSoft CRM for material management transactions.

2. Synchronize item data between PeopleSoft CRM and the purchasing and inventory systems.

   Activate the Item Master EIP to populate item tables in PeopleSoft CRM with the master item data in your inventory and purchasing systems. Alternatively, you can manually enter item information in both PeopleSoft CRM and your inventory system.

3. Define truck storage locations in the inventory system.

In the inventory system, first define inventory business units with storage locations that represent good and defective storage locations on the field service trucks. In PeopleSoft CRM, use the Storage Locations page of the Worker component (RD_WORKER_2) to associate one good truck stock location and one defective truck stock location with each member of your field service provider groups.

4. Define requisition processing defaults in your purchasing system.

   In your third-party systems, define how requisitions that are initiated from the Order Materials page are processed. If your system integrates with PeopleSoft Purchasing, you must define your field service business units as a valid source of requisitions in PeopleSoft Supply Chain Management (PeopleSoft SCM).

   By using the Requisition Loader Defaults component in PeopleSoft Supply Chain Management, you define each field service business unit as a loader business unit and establish processing defaults for requisitions that are staged by the field service business unit, including the purchasing business unit in PeopleSoft Purchasing that will process the requisitions.

   When defining procurement options in PeopleSoft Supply Chain Management, use the Ship To Locations page to associate the field service business unit with an appropriate distribution network. You can configure sourcing processes in PeopleSoft Purchasing to check the available quantity in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, you can create an interunit transfer to fulfill the requisition. Inventory business units representing field service trucks should not be included in distribution networks.

5. Define requesters in PeopleSoft CRM and the purchasing system.

   The requester ID represents a person or entity that initiates a requisition request. For requisitions that are initiated from the Order Materials page, the system populates the Requester field with the default requester ID defined on the User Preferences - Overall Preferences page. You can modify the requester ID. However, if your system integrates with PeopleSoft Purchasing, the requester ID that you select for the requisition in PeopleSoft CRM must be a valid user ID and requisition requester in PeopleSoft Purchasing.

6. Set receiving options for the field service business units.

   When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders that are initiated from the Order Materials page can be automatically received. With automatic receiving, technicians enter only usage information on the service order (the quantity used and the quantity not used) from which the system automatically derives and posts the appropriate receiving transactions. Neither option offers significant data-entry advantages, and the material management transactions produced in both automatic and manual receiving environments are identical.

7. Activate the EIP messages that are associated with material management transactions.

   As appropriate for the specific material management transaction, activate these EIP messages in your PeopleSoft CRM, purchasing, and inventory systems:

   • Business Unit EIP.

   • Item Balance EIP.

   • Get Purchase Order Interunit EIP.

   • Purchase Order Requisition EIP.

   • Inventory Adjustment EIP.

   • Interunit Receiving EIP.

   • Purchase Order Receipt EIP.

**See Also**

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

*PeopleSoft Enterprise Purchasing PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

# Managing Materials

This section provides an overview on material management transactions discusses how to:

• Perform material order transactions.

• Modify ship to addresses.

## Understanding Material Management Transactions

This section discusses:

• Item balances.

• Item availability.

• Material orders.

• Requisition status.

• Receipts of material.

### Item Balances

Before ordering an item for a service order activity on the Order Materials page, you can check item balance information at two levels:

• Stock balances for the good truck stock storage locations that have been associated with each member of the provider group assigned to the service order line.

• The current quantity that is available and on-hand balances for the inventory business units that form the distribution network for your field service operations.

With this information, you can determine whether a material order is necessary and, if so, set expectations about when material will be received based on whether the required quantity is stocked in one of your distribution centers or must be ordered from an external vendor.

In PeopleSoft CRM, group members are associated with storage locations in your inventory system that represent their good and defective truck stock. You make these associations on the Storage Locations page of the Worker component. The PeopleSoft CRM system uses the Item Balance EIP to retrieve balance information for the good truck stock storage locations from PeopleSoft Inventory or your third-party inventory system. The balance information appears on the Item Balance by Group Members page in PeopleSoft CRM.

This diagram illustrates how the integration between PeopleSoft CRM and your inventory system supports storage location balance checking:
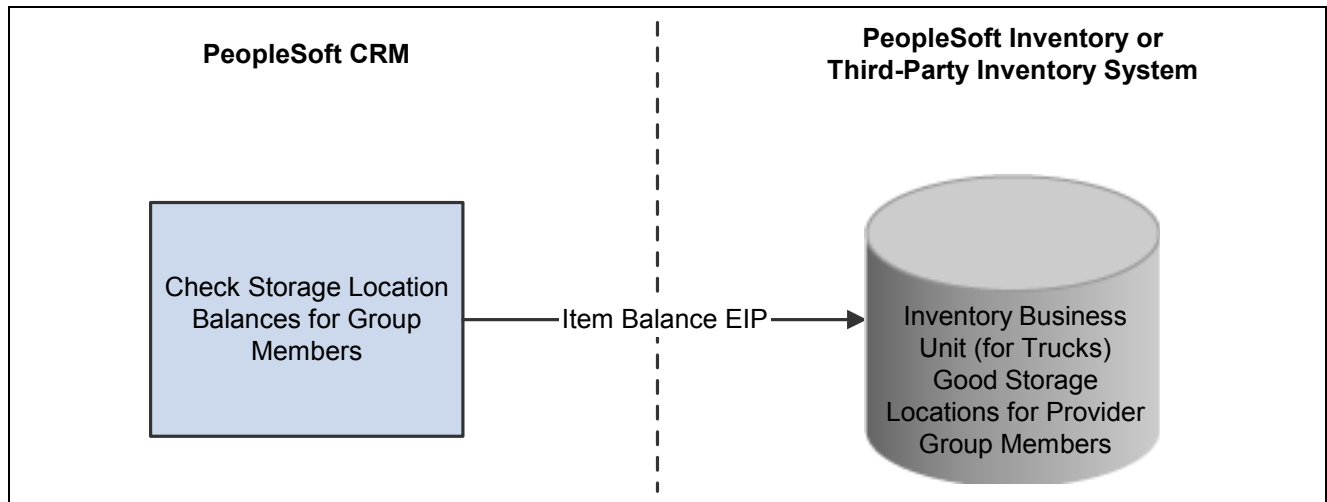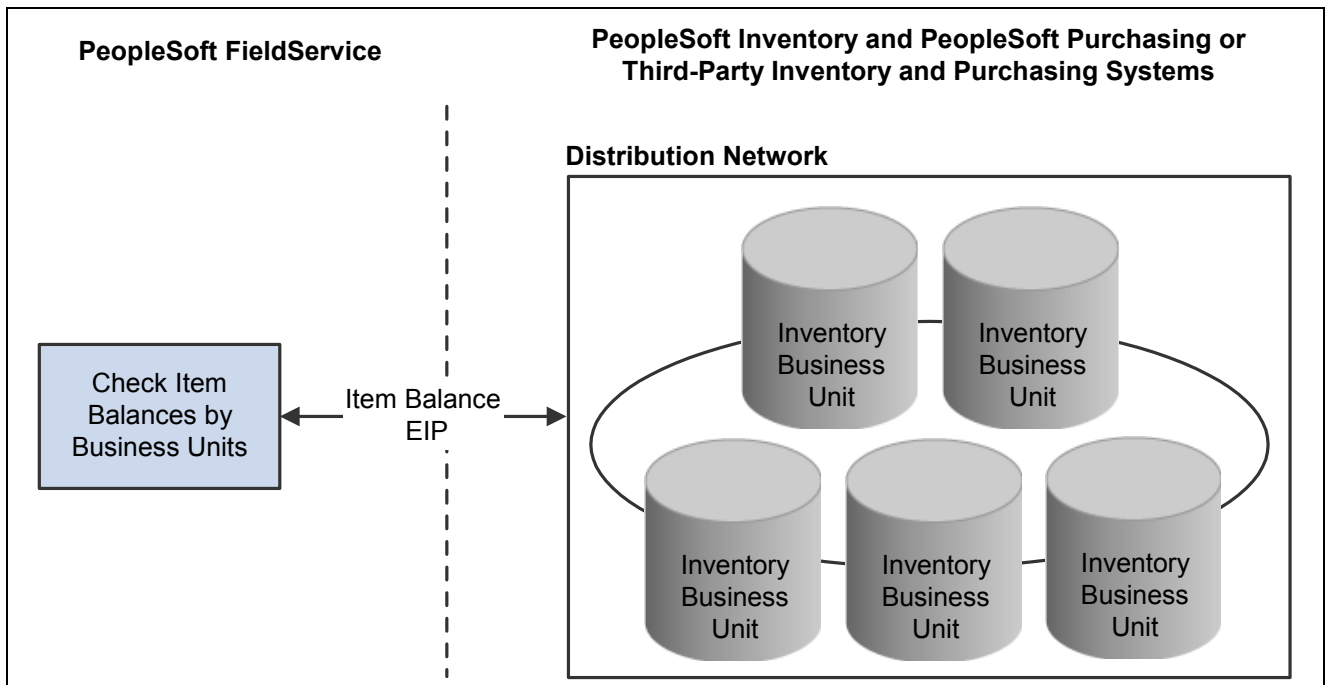


Integration that supports balance checking for truck storage locations

You can also check on-hand balances for the inventory business units included in the distribution network defined for your field service operations. The PeopleSoft CRM system uses the Item Balance EIP to retrieve the quantity that is available and on-hand balance information from the appropriate inventory business units defined in PeopleSoft Inventory or your third-party inventory system. The balance information appears on the Item Balance by Business Units page in PeopleSoft CRM.

**Note.** When integrating with PeopleSoft Purchasing and PeopleSoft Inventory, you define a distribution network of inventory business units for each business unit in PeopleSoft CRM that can request material for service orders or as replacements or exchanges for material returns.

This diagram illustrates how the integration between the PeopleSoft CRM system and your inventory and purchasing systems supports on-hand balance checking:

Integration that supports checking the quantity that is available and on hand

## Item Availability

If your PeopleSoft CRM system is integrated with PeopleSoft Inventory and you are accessing system pages through the portal by using the single sign-on feature, you can access the Item/Product Availability component in PeopleSoft Inventory from the Order Materials page.

With the Item/Product Availability component, you can confirm the current quantity that is available for an item, check the cumulative available-to-promise (ATP) quantity for future dates, and view future supply and demand information for the item.

This information enables you to set expectations about the expected receipt date for items that are being ordered to complete work on a service order line or to replace material that a customer is returning. This functionality is especially useful for items that are currently out of stock or for which demand often exceeds supply.

## Order Materials

When you click the Order and Receive Items button on the Order Materials page after ordering material, the PeopleSoft CRM system stages a requisition for the order quantity in PeopleSoft Purchasing or your third-party system by using the Purchase Order Requisition EIP.

If your implementation includes PeopleSoft Purchasing and PeopleSoft Inventory, sourcing processes in PeopleSoft Purchasing determine whether the order can be partially or completely fulfilled by an interunit transfer from the inventory business units in your distribution network or whether a purchase order must be placed with an external vendor.

The appropriate interunit transfer orders and purchase orders are created in the applicable systems, fulfilled by the inventory business unit or vendor, and shipped to the address specified for the material line in PeopleSoft CRM.

**Note.** In PeopleSoft CRM, interunit transfers are stock transfers between inventory business units in the enterprise. One of the assumptions of the integration design that supports material orders for service order lines is that material is transferred from an inventory business unit to the inventory business unit in which the technician's good truck stock storage location is defined.

For this reason, we recommend that you define an inventory business unit to track only truck stock storage locations. To prevent stock in the truck storage locations from being used to fulfill other material requests, the inventory business unit for trucks should not be included in any distribution networks defined in PeopleSoft Purchasing.

This diagram illustrates how the integration between the PeopleSoft CRM system and your inventory and purchasing systems supports ordering the material that is required to complete work on a service order activity:
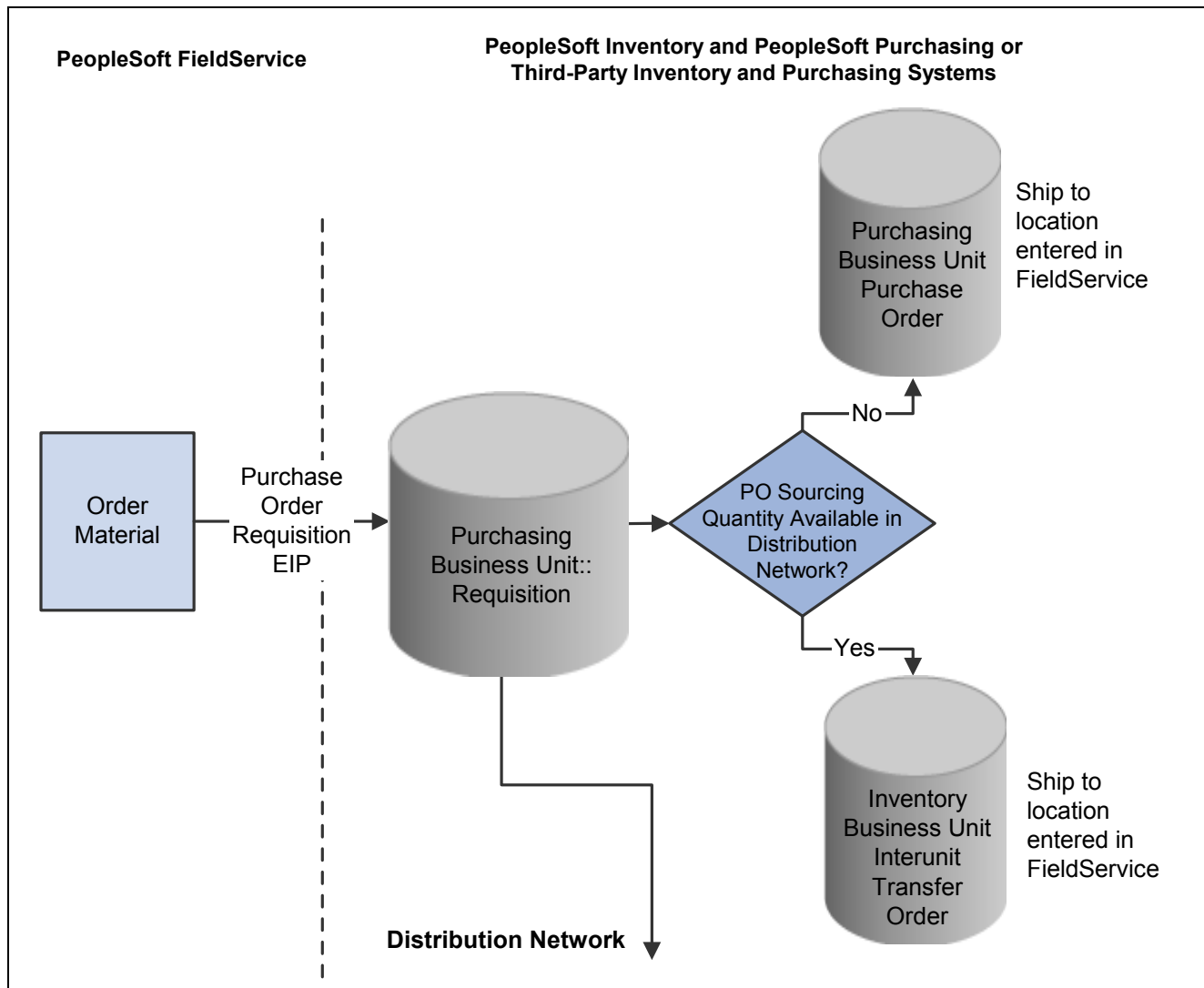


Integration that supports ordering required material

**Note.** PeopleSoft Purchasing or your third-party purchasing system handles processing of the requisitions that are staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

## Requisition Status

In implementations that include PeopleSoft Purchasing on the portal, you can transfer to the Requisition Workbench in PeopleSoft Purchasing to check the processing status of orders that are initiated from the Order Materials page.

When an order is initiated from the Order Materials page, the system stages a requisition for the order in PeopleSoft Purchasing by using the Purchase Order Requisition EIP and displays the requisition ID that is assigned to the order on the material line.

By using the requisition ID as search criteria for the Requisition Workbench, you can check the status of the requisition in PeopleSoft Purchasing. The Requisition Workbench also enables you to check the status of all requisitions by the requester that are listed on the material line.

**Note.** In PeopleSoft CRM, you can define a default requester ID on the User Preferences - Overall Preferences page under Set Up CRM, Security, User Preferences. If your system integrates with PeopleSoft Purchasing, the requester ID on the requisition must be a valid user ID and requisition requester in PeopleSoft Purchasing.
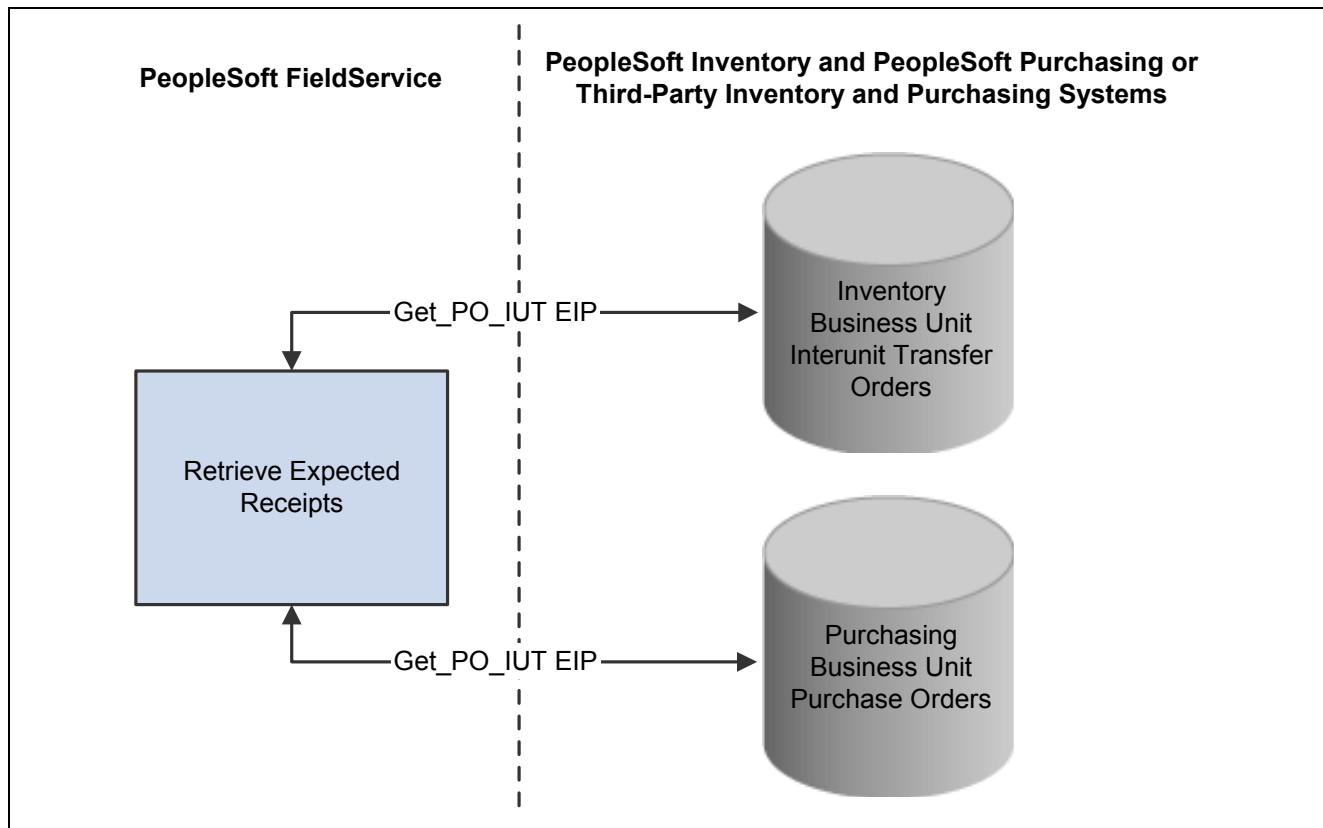
## Receiving Material

When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders that are initiated from the Order Materials page can be automatically received. The item ID is populated with the ordered item ID. If a substitute item was received instead, the user must enter the substitute item ID.

With automatic receiving, technicians enter usage information only in the service order component, not the order materials component, from which the system automatically derives and posts the appropriate receiving transactions.

If automatic receiving is not enabled, technicians manually record receipt of ordered material in the Receipts grid on the Order Materials page. The PeopleSoft CRM system uses the Get PO IUT EIP to retrieve expected receipt information for any purchase orders or interunit transfer orders that are created in your inventory and purchasing systems to fulfill the requested quantity on the item line.

This diagram illustrates how the integration between the PeopleSoft CRM system and your inventory and purchasing system supports retrieving expected receipt information:

Integration that supports retrieving expected receipt information

You can modify the expected receipt information to reflect the actual material shipment. When you click the Order and Receive Items button on the Order Materials page, the PeopleSoft CRM system stages the appropriate receipt transactions in your purchasing and inventory systems by using the PO Receipt EIP for purchase orders and the Interunit Receipt EIP for interunit transfers.

**Note.** When you record the receipt of ordered materials, you can choose the receiving technician from a list all technicians assigned to the service order. On the PeopleSoft SCM side, the system calculates receipts against either the interunit transfers or purchase order for the good storage location of the technician who received the materials. If automatic receiving is enabled, then the used and not used material transactions are used to calculate the receipt quantity. This calculation is made against the good storage location of the selected technician instead of the lead technician's good storage location.

Both interunit and purchasing receipt transactions are staged to your inventory system so that the quantity in the storage location that is associated with the lead technician's good truck stock can be increased by the receipt quantity. If your system integrates with PeopleSoft Inventory, the system increases the quantity in the corresponding storage location when the Putaway process is run for the receipt.

**Important!** When integrating with PeopleSoft Inventory, you must clear the Flag Items for Auto-Putaway check box to require a receipt transaction to be performed against all interunit receipts. When the Flag Items for Auto-Putaway check box is selected, the PeopleSoft Inventory system automatically sets the status of the interunit transfer to *Received* without requiring a receipt transaction. If the status of the receipt is set to *Received,* the PeopleSoft CRM system cannot retrieve the *expected receipt* information for the order on the Order Materials page.

This diagram illustrates how the integration between the PeopleSoft CRM system and your inventory system supports recording the receipt of material shipments that are ordered to complete work on a service order line:
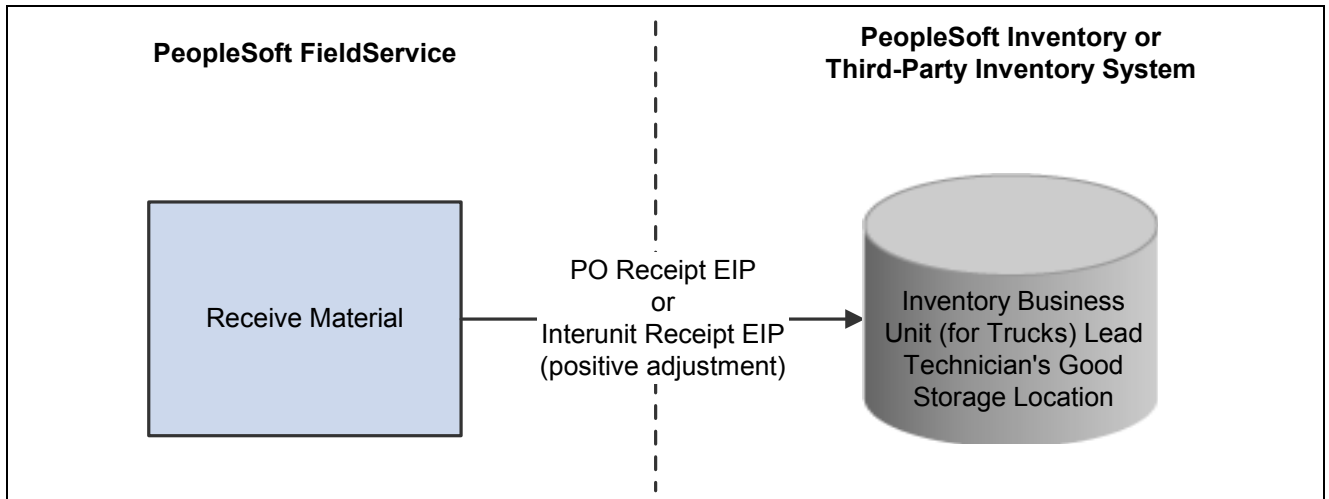
Integration that supports recording the receipt of material shipments

## See Also

Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," page 13

Chapter 12, "Integrating with PeopleSoft Applications," page 161

Chapter 4, "Understanding Inventory Storage Locations for Technicians," page 23

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook,* "Defining Workers"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook,* "Checking Item Balances and Availability"

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

*PeopleSoft Enterprise Purchasing PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

## Pages Used to Order Materials

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Order Materials | RF_MATERIAL_ORDERS | FieldService, Order Materials, Order Materials | Request materials that are required to perform a service order activity.<br><br>**Note.** There is a second Order Materials component with the same navigation and object name. This component is security-based in that it only retrieves service orders that are assigned to the user who signed into the system. It is similar to My Service Order. This page is the same as the regular Order Materials page, except it returns different search results. |
| Material - Ship to Address | RF_MANAGE_MAT_ADD | Click the Ship To Location link on the Order Materials page. | View and modify the address where the material that is ordered on the Order Materials page will be shipped. |

## Performing Material Order Transactions

Access the Order Materials page.



Order Materials page

If the service is defined with service activities, the system populates the material orders record with the material that is defined for the service activities. If no activities are defined for the service, the system populates the manage material record with the material that is defined for the service. Each item defined for the service or service activity becomes a material line on the material orders record. Click the Add Needed Item button at the bottom of the page to insert additional material line rows.

---

**Note.** Unless overridden by the requester, materials are shipped to the technician specified on the material line on the service order.

---

This information appears for each item:

| | |
|---|---|
| **Item** | Displays the item required to perform the service activity. The system displays the description of the selected item next to this field. Items are established in your system tables by using the Item Definition page or the Item Master EIP. |
| **Service Order** | Displays the service order number. |
| **Activity** | Displays a description of the activity. |
| **Quantity Needed** | Displays the amount of the item, in the item's standard unit of measure, that is required to perform the service or service activity as defined in the Service component. |
| **Quantity in Truck** | Displays the amount of the item that is in the technician's truck. |
| | This field is populated with the results of the Item Balance by Group Member EIP. |
| **Check Availability** | Click this link to access a transfer page with the these links: |

- Item Definition: Click this link to access the Item Definition page, where your can view the item's definition in PeopleSoft CRM.

- Item Substitutes: Click this link to access the Substitutes page, where you can view any substitutions that are defined for the item in PeopleSoft CRM.

- Item Availability: Click this link to access the Item/Product Availability inquiry page in PeopleSoft Inventory, where you can check the current quantity that is available for an item or product, as well as the projected future availability.

- Item Balance by Group Members: Click this link to access the Item Balance by Group Members page, where you can view the item quantity balance in the good truck stock storage location that is associated with each member of the provider group assigned to the service order line.

- Item Balance by Business Units: Click this link to access the Item Balance by Business Units page, where you can view the available and on-hand quantities for each of the inventory business units in the distribution network defined for your field service operations.

| | |
|---|---|
| **Quantity Ordered** | Displays the amount of the item that was ordered. |
| **UOM** (unit of measure) | Displays the standard unit of measure for the item quantity. |

## Item Details

| | |
|---|---|
| **Requester** | Enter the ID of the person or entity associated with the requisition request. The system populates this value with the default requester ID defined on the User Preferences - Overall Preferences page. If you have implemented PeopleSoft Purchasing, you can use the requester ID and the Requisition Workbench to check the status of all the requisitions that are entered by a specific person. |
| | **Important!** If your system integrates with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established under Structure Procurement Options, Requester Setup in PeopleSoft Supply Chain Management. |
| **Ordered By** | Select the name of the person who is ordering the item. |
| **Lead Technician** | Displays the name of the lead technician for the service order activity. |
| **Ship To Location** | Click this link to access the Material - Ship to Address page, where you can view and modify the address where the ordered material will be shipped. By default, the PeopleSoft CRM system populates the ship to location with the address that is associated with the lead technician's location code, as selected on the Job Detail page of the Worker component. Locations are defined under Set Up CRM, Common Definitions, Location, Location. |
| | **Note.** After you click the Order and Receive Items button, you cannot modify the ship to address in your PeopleSoft CRM system. After the Purchase Order Requisition EIP has been published, you can change the ship to address only in your purchasing or inventory systems. |
| **Requisition Workbench** | If the implementation includes PeopleSoft Purchasing, you can click this link to check the requisition status by requester or requisition. |

## Receipts

Enter receiving information when automatic receiving is not selected at the business unit level. When automatic receiving is selected, the system hides this grid. Users can enter an amount in the Quantity Received field. To enter a substitute item, serial ID, and lot ID, select the Item tab.

After entering receipt data, click the Order and Receive Items button at the bottom of the page to save the information. The system then runs the PO Receipt and Interunit Receipt EIPs.

| | |
|---|---|
| **Order and Receive Items** | Click to save the page and create a requisition for the order quantity in PeopleSoft Purchasing or your third-party system. |
| | **Note.** The label on the Order and Receive button changes to Order when automatic receiving is enabled. |
| **Add Needed Items** | Click to add a new item to a service order. The system displays a new grid that you can use to add a new item to the order. |

**See Also**

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Tracking Installed Products and Assets"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Checking Item Balances and Availability"

*Enterprise PeopleTools PeopleBook: Internet Technology*

# Modifying Ship To Addresses

Access the Material - Ship to Address page.



Material - Ship to Address page

You can modify the ship to address information for each material line on the Order Materials page until the quantity is ordered for the line. After you enter an order quantity on the material line and click the Order and Receive Items button on the Order Materials page, the ship to address information can be viewed only, not updated.

# Setting Up, Viewing, and Recording Material Usage from the Service Order

To define failure codes types, use the Failure Code (RF_FAILURE_CD) component. To load data into the tables for this component, you can also use the RF_FAILURE_CD_SCI component interface.

This section provides an overview on material usage and discusses how to:

• Define failure codes.

• View required materials.

• Track time, materials, and expenses associated with a service order.

### See Also

Chapter 12, "Integrating with PeopleSoft Applications," page 161

Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," page 13

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Tracking Installed Products and Assets"

Chapter 4, "Understanding Inventory Storage Locations for Technicians," page 23

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties"

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

## Understanding Material Usage and Removal

This section discusses:

• Material usage.

• Automatic receiving.

• Material removed from customer sites.

### Material Usage

Technicians record the quantity of material used to perform the work for a service order activity on the Time Material Expense page for the service order. When an item ID and quantity is entered and saved, the PeopleSoft CRM system determines whether a corresponding installed product exists for the item.

Depending on the rules governing creation and updates for installed products, an installed product may exist if an order for the material was placed using PeopleSoft Order Capture, Order Capture Self Service or if an automatic shipping notification (ASN) message for the item was sent to the PeopleSoft CRM system.

If an installed product exists, the system updates the status of the record by using the rules that are established on the Installed Product page in the Product Definition component.

The system publishes the Inventory Adjustment EIP to stage negative adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to decrease the quantity in the storage location that is associated with the selected technician's good truck stock by the usage quantity.

If your system integrates with PeopleSoft Inventory, the system decreases the quantity in the technician's good truck stock storage location when the Inventory Adjustment process is run for the staged transaction. If required, the system also creates a new installed product for the item by using rules that are defined for the corresponding product on the Installed Product page in the Product Definition component.

**Note.** When you are recording material usage, you may choose a technician from those assigned to any service order activity. The system records the user ID of the person who entered the usage transaction. If the system cannot determine the user ID of the technician who entered the transaction, it uses the ID of the lead technician. On the PeopleSoft SCM side, the inventory adjustment (decrease) is made against the good storage location of the technician who used the materials.

This diagram illustrates the material usage transaction:
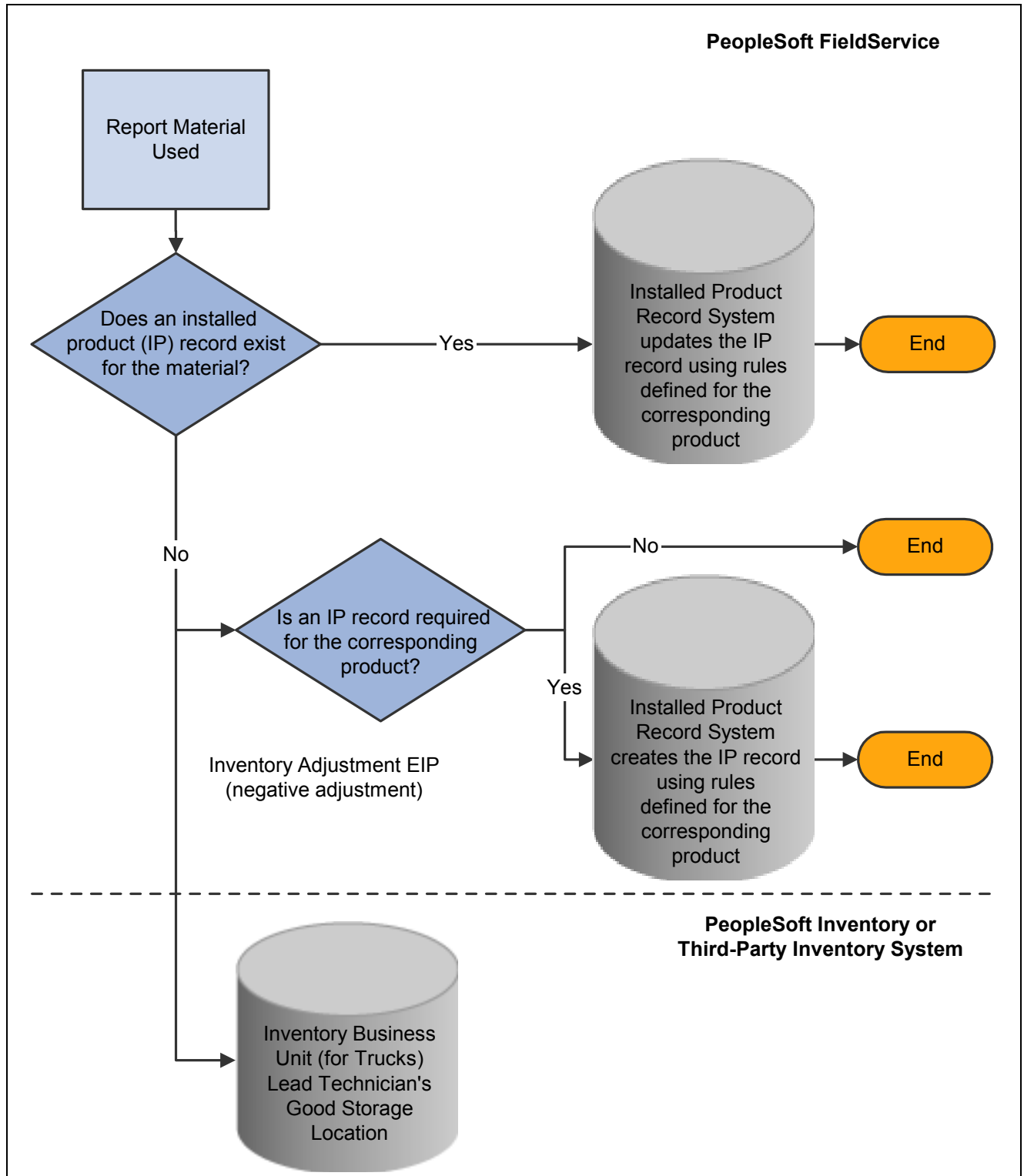
Material usage transaction

**Note.** Because the order of positive and negative adjustment transactions to inventory storage locations cannot be predicted, set up your inventory system to allow transactions to drive inventory quantity balances to be negative.

## Automatic Receiving

In field service business units that enable automatic receiving, technicians use the Time Material Expense page for the service order to record the portion of the material shipment that was not required to complete the work on the service order activity. The system automatically runs the expected receipts to prepopulate the Material grid on the page.

The system adds the used and unused quantity to derive the receipt quantity and increases the selected technician's good storage location in PeopleSoft Inventory or your third-party inventory system.

If automatic receiving is enabled, technicians enter usage information for a material shipment in the Material grid on the Time Material Expense page of the Service Order.

When you save the Service Order, the PeopleSoft CRM system stages the appropriate receipt transactions in your purchasing or inventory systems by using the PO Receipt EIP for purchase orders and the Interunit Receipt EIP for interunit transfers. The system derives the receipt quantity by adding the used and not used quantities.

## Material Removed from Customer Sites

Technicians record material that they remove from a customer's site by selecting *Removed* from the Action field on the Usage Details tab on the Time Material Expense page for the service order.

**Note.** When you record material removed from a customer site, you may choose the technician from those assigned to the service order activity. The system records the user ID of the person who entered the removal transaction. If the system cannot determine the user ID of the technician who entered the transaction, it uses the ID of the lead technician. On the PeopleSoft SCM side, the inventory adjustment (increase) is made against the defective storage location of the technician who removed the materials.

When an item quantity is entered in the Usage Details grid and the page is saved, the PeopleSoft CRM system publishes the Inventory Adjustment EIP to stage positive adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to increase the quantity in the storage location that is associated with the lead technician's defective truck stock by the removal quantity.

If your system integrates with PeopleSoft Inventory, the system increases the quantity in the selected technician's defective truck stock storage location when the Inventory Adjustment process is run for the staged transaction.

If the item that is associated with the product on the service order header and the serial number on the service order header are the same as the item and serial number on the Usage Details grid, saving the item quantity also triggers PeopleSoft CRM to check the installed products for the customer on the service order activity.

The system sets the installed product for the removed item to *Uninstalled.* Before saving, if an item that is associated with an installable product is also listed on the Usage Details grid, the system inserts a new installed product for the replacement item and serial number with a status of *Installed.*
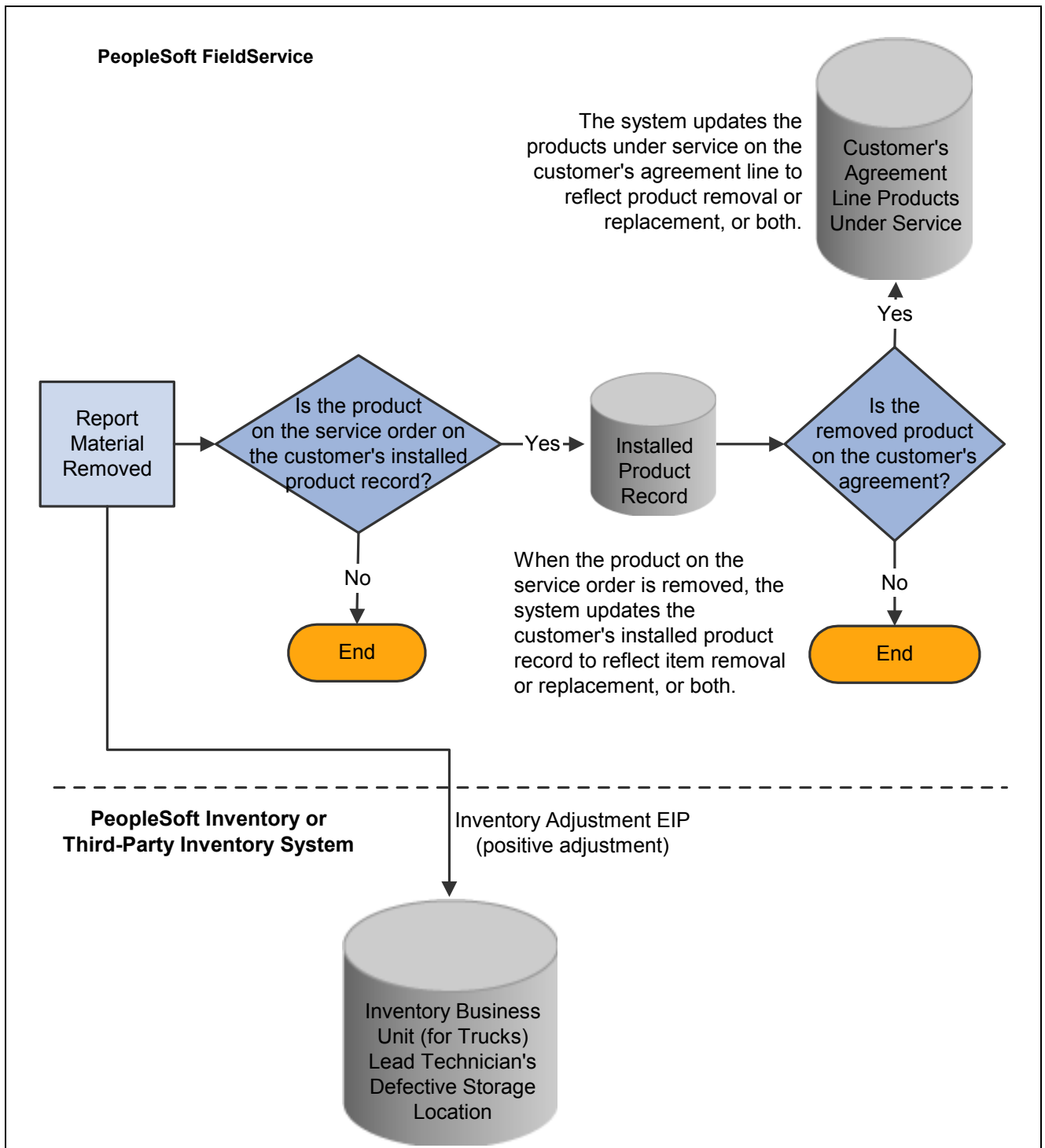
**Note.** To set up statuses, use the Installed Product page of the Product component.

While you can use the same default values across all products by applying the default values at the product level with a click of a button, you can also overwrite the default values for specific products.

If the system replaces the installed product, it also determines whether any of the customer's agreement lines reference the removed item as a product under service. If the removed item is referenced as a product under service, the system removes the obsolete line from the record for the product under service and inserts a new line representing the replacement item. If preventive maintenance is available to the installed product of the removed item, it is transferred and made available to the replacement installed product.

If the removed item is defined as a consumable item on the Item Definition page, no adjustment transaction is triggered. It is expected that the consumable item is thrown away rather than returned to the truck. However, you should record removal of consumable items using the Usage Details tab on the Time Material Expense page so that the system can make appropriate changes to the customer's installed product and the products under service on the associated agreement line.

This diagram illustrates how the integration between the PeopleSoft CRM system and your inventory and purchasing system supports recording the removal of material from a customer site:

**PeopleSoft FieldService**

The system updates the products under service on the customer's agreement line to reflect product removal or replacement, or both.

Customer's Agreement Line Products Under Service

Yes

Report Material Removed → Is the product on the service order on the customer's installed product record? —Yes→ Installed Product Record → Is the removed product on the customer's agreement?

No → End

When the product on the service order is removed, the system updates the customer's installed product record to reflect item removal or replacement, or both.

No → End

**PeopleSoft Inventory or Third-Party Inventory System**

Inventory Adjustment EIP (positive adjustment)

Inventory Business Unit (for Trucks) Lead Technician's Defective Storage Location

Integration that supports recording the removal of material from a customer site

Your business processes dictate how removed material in a technician's defective storage location should be handled. Typically, this stock is transferred to a distribution center's inspection storage location by using the inventory system. At the distribution center's inspection location, a decision is made to scrap, recycle, repair, or restock the item in available inventory stores.

**See Also**

*PeopleSoft Enterprise Components for CRM 9 PeopleBook*

*PeopleSoft Enterprise Inventory PeopleBook*

# Pages Used to Set Up, View, and Record Material Usage and Removal on Service Orders

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Failure Codes | RF_FAILURE_CD | Set Up CRM, Product Related, FieldService, Failure Codes, Failure Codes | Define failure codes to be used for removed materials. |
| Required Material | RF_MAT_REQUIRED | FieldService, Add Service Order, Required Material | Lists all items and their quantities needed for the service. You can also view item availability and balances. |
| Time Material Expense | RF_SO_TIME_MAT_EXP | FieldService, Add Service Order, Time Material Expense. | Record time, material, and expense information.<br><br>**Note.** You cannot log time, material, and expense entries against a service order until the service order has been saved. |

# Defining Failure Codes

Access the Failure Codes page.

## Failure Codes

**SetID** CRM01

| *Failure Code | *Description | Short Description | |
|---|---|---|---|
| AIRSWITCH | Air Switch Failure | Switch | 🗑 |
| BADSEAL | Bad Seal | Seal | 🗑 |
| BENTSHAFT | Bent Shaft | Shaft | 🗑 |
| CASEFAIL | Compressor Case Cracked | Case | 🗑 |
| COILFAIL | Coil Failure | Coil | 🗑 |
| CYCLEFAIL | Cycle Setting Failure | Cycle | 🗑 |
| EXCESSFLOW | Excess Flow | Excess | 🗑 |
| FRZTMPFAIL | Freezer Temp Setting Failure | Temp Set | 🗑 |
| HDFAIL | Heated Drying Setting Failure | Drying | 🗑 |
| LOWCOMP | Low Compression Rate | Compress | 🗑 |
| LOWEXCHANG | Low Exchange Rate | Exchange | 🗑 |
| LOWPOWER | Low Power | Low Power | 🗑 |
| NOPOWER | No Power | No Power | 🗑 |
| NOREVERSE | Fan Does Not Reverse | Reverse | 🗑 |

Failure Codes | Customize | Find | View All | First ◄ 1-23 of 23 ► Last

Failure Codes page (1 of 2)

| ONOFFFAIL | On/Off Switch Failure | Switch | 🗑 |
|---|---|---|---|
| REFTMPFAIL | Refrigerator Temp Setting Fail | Temp Set | 🗑 |
| RINSEFAIL | Rinse Setting Failure | Rinsing | 🗑 |
| SENSORFAIL | Sensor Failure | Sensor | 🗑 |
| SOLSWITCH | Solenoid Switch Defective | Switch | 🗑 |
| SOLSWITCHS | Slow Solenoid Switch | Switch | 🗑 |
| THERMFAIL | Thermostat Failure | Thermostat | 🗑 |
| TIMERFAIL | Timer Failure | Timer | 🗑 |
| TUBELEAK | Tube Leak | Tube | 🗑 |

Add Failure Code

Failure Codes page (2 of 2)

**Failure Code**      Enter a failure code that can be used when specifying removed items on the Time Material Expense page. Failure codes identify what went wrong with parts that caused them to be removed from customers' sites. You can enter up to 10 alphanumeric characters.

**Add Failure Code**      Click to add a new failure code.

# Viewing Required Materials

Access the Required Material page.



Required Material page

Use this page to view the required materials for the service order.

### See Also

Chapter 7, "Creating and Managing Service Orders," Viewing Required Materials, page 98

# Tracking Time, Material, and Expenses Associated with a Service Order

Access the Time Material Expense page.

Time Material Expense page (1 of 2)



Time Material Expense page (2 of 2)

Use this page to record time, material, and expense information.

## See Also

Chapter 7, "Creating and Managing Service Orders," Tracking Time, Material, and Expenses Associated with a Service Order, page 100

# CHAPTER 9

# Working with My Service Orders

This chapter provides an overview of the My Service Order component and discusses how to:

• View and update service orders.

• Troubleshoot service order problems.

## Understanding the My Service Order Component

Typically, a call center agent or dispatcher creates and assigns service orders on the Service Order page. Once a service order line is assigned, the assigned technician, using the My Service Order component, can update the status of the service order line, record time and expenses for the requested work, and report material usage. To order materials usage, the technician must use the Order Material component.

The My Service Order component and the Service Order component provide two views of a customer's service order. You can modify the service order from either component, because both components are subject to the same edits. Because the My Service Order and Service Order components have similar functionality, they share features for service orders.

For example, both components are enabled for Active Analytics Framework (AAF), which triggers workflow. In addition, you can control the visibility of certain fields and features in service orders through the use of configuration templates.

See Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," Defining Configuration Templates for Service Orders, page 19.

There are, however, functional differences between the Service Order and My Service Order components. The My Service Order component does not provide:

• Time zone information.

• Customer entitlement searches.

   Entitlement details are provided through a link next to the agreement.

• Approval processing.

   The page, however, shows whether a service order or activity needs approval.

In addition to page layout, AAF has been enabled for the My Service Order component to trigger workflow actions and send notifications. When the conditions that are defined in AAF policies become true, the system triggers associated workflow actions automatically and corresponding notifications are sent to assigned recipients.

PeopleSoft delivers a set of AAF policies for the service order that use the workflow action. You can, however, create new policies and conditions to trigger workflow.

### See Also

# Viewing and Updating Service Orders

This section discusses how to view and update service orders.

## Page Used to View and Update Service Orders

| Page Name | Object Name | Navigation | Usage |
|-----------|-------------|------------|-------|
| My Service Order | RF_SO_TECH | FieldService, My Service Orders, My Service Order | View and update assigned service orders.<br><br>**Note.** You cannot access this page if no service orders have been assigned to you. |

## Viewing and Updating Service Orders

Access the My Service Order page.

My Service Order page (1 of 2)



My Service Order page (2 of 2

Most of the fields on this page are identical to fields on the service order page in the Service Order component. If you open service orders from the My Service Order component, you have access to almost all service order-specific information and actions that are available in the Service Order component. The only exception is that you cannot create new service orders, view time zone information, or select agreements and warranties in the My Service Order component.

See Chapter 7, "Creating and Managing Service Orders," page 63.

## Customer Information

This section is almost identical to its equivalent section in the Service Order component. However, you cannot modify values in the Customer and Service fields. You can use the Alternative Phone field to connect a phone number with the service order, although this field is for informational purposes only.

## Agreement and Warranty

Agreement and warranty information does not appear if it has not been specified in the associated service order records. A technician cannot change the agreement or warranty, but can use the More Detail link to view entitlements. The agreement name is not a link, because the technician should not be able to transfer to the agreement definition.

## Incident Address

This group box is the same as the one for service orders.

This group box appears if the Allow Incident Address check box is selected in the configuration template that is tied to the business unit to which the service order belongs.

See Chapter 3, "Defining Business Units in PeopleSoft Integrated FieldService," Defining Configuration Templates for Service Orders, page 19.

## Service Details

Both the Service Order and My Service Order pages display the service ID and the service description. You can enter the service ID in add mode only. Because the technician performing the work is usually first interested in what the service is and then in any additional supporting detail, the system displays the Problem field after the service information.

**Note.** The information in the Problem field can come from the case if the service order was created from a case.

You can access the service definition from both the Service Order and My Service Order components. The product ID and serial number prompts are based on the service order configuration.

Priority values available for the service order are *Low, Normal, High,* or *Urgent.*

The system displays the Case ID field on both the Service Order and My Service Order pages, but it is read only on the My Service Order page. Once the service order is saved, however, the field is read only on the Service Order page as well.

**Note.** The Activity Actions section, which is available on the Service Order page is not available on the My Service Order page. Users do have the ability, however, to change the status for all activities by selecting a value from the Change Status for All My Activities drop-down list menu beneath the Activities grid and clicking the adjacent Update button.

## Activity Details

This group box appears in a grid on the first page of the component. The grid contains three tabs: Activity Details, Planned Dates and Times, and Technicians Assigned. If the service order is assigned to only one technician, then the Technicians Assigned tab is not visible and Lead Technician is not visible on the Activity Details tab. Also, if the activity priority is not selected during service order configuration, the system hides the Priority column on the Activity Details tab.

If Priority is hidden and there is only one technician assigned, the system does not display any tabs in this grid.

The View drop-down list box appears only when more than one technician is assigned to the service order.

The Activity Details grid provides a summary list of activities for the service order. Each activity in the grid contains information, such as step numbers, the associated service activity, the current status, the planned start date and time, the estimated duration, and the number of technicians that is required to finish the activity.

**Note.** The system displays the Required Technicians field shown if the Technicians Assigned tab is visible.

## Required Material

Access the Required Material page to view all items and their quantities needed for the service. You can also view item availability and balances, which are based on the service definition for the service order. The Required Material page appears in both the Service Order and My Service Order components and behaves similarly in both.

## Solutions

Access the Solutions page to search for and suggest solutions that are associated with the service order. The Solutions page appears in both the Service Order and My Service Order components and behaves similarly in both.

## Time Material Expense

Access the Time Material Expense page to record time, materials, and expenses for the activities on the service order. This page appears in both the Service Order and My Service Order components and behaves similarly in both. The default technician is the person who is signed in. Technicians can view and update only their own expenses. Time entries for all technicians appear, but the default technician can edit only their own entries. The appearance of the billable flag is based on the service order configuration.

## Notes

Access the Notes page to add or view notes and attachments for the activities on the service order. The Notes page appears in both the Service Order and My Service Order components and behaves similarly in both.

## Interactions History

Access the Interaction History page to view a list of interactions that are associated with the service order. The page displays a summary of all interactions for the service order. The Interactions History page appears in both the Service Order and My Service Order components and behaves similarly in both.

## Related Objects

Access the Related Objects page to view business projects and troubleshooting scripts and to associate them with the service order. The Related Objects page appears in both the Service Order and My Service Order components and behaves similarly in both.

**See Also**

PART 4

# Management Tools

**Chapter 10**
**Using the Dispatch Board**

**Chapter 11**
**PeopleSoft Integrated FieldService Interactive Reports**

# CHAPTER 10

# Using the Dispatch Board

This chapter provides an overview of the dispatch board and discusses how to:

• Define dispatch board configuration settings.

• Work with the dispatch board.

## Understanding the Dispatch Board

The dispatch board in PeopleSoft Integrated FieldService offers a graphical representation of the task assignments for technicians over a given period of time, together with a list of assigned and unassigned service orders in a business unit that have not been completed, closed, or canceled. With the dispatch board, dispatchers can manage the daily service order workload for field service business units, assign service orders to technicians, resolve scheduling conflicts, and escalate high-priority work.

A dispatcher can select a technician and enter the priority, status, and start dates and times for a service order activity without leaving the Dispatch Board page.

On the Dispatch Board page, you can view a bar graph that represents 24-hour work schedules and availability for a group of technicians, beginning with the date and start time that you enter on the page. On the bar graph header, click the Previous Day and Next Day links to scroll through days prior to or after the selected date.

You can also view all open service order activities for a selected business unit. Links provide access to each technician's daily work schedule calendars, where you can view details of scheduled tasks and events that are unrelated to service order assignments.

You can also change technician assignments, modify start and end times, and update current statuses directly from the Dispatch Board page through the grids. You can also access the Service Order page to complete these tasks as well as change technician assignments, modify start and end times, and update the current status for each assigned and unassigned service order activity in the business unit.

Before using the dispatch board, define a dispatch board configuration for each field service business unit on the Dispatch Board Setup page. Dispatch board configuration settings control the pattern that the system uses to represent the service order activity status, the number of technicians that are listed on each Dispatch Board page, the default start time of the dispatch board display, and the smallest increment of time that a task bar on the dispatch board represents.

### See Also

Chapter 7, "Creating and Managing Service Orders," page 63

# Defining Dispatch Board Configuration Settings

To define dispatch board configuration settings, use the Dispatch Board Setup (RF_DISP_SETUP) component.

This section discusses how to define dispatch board configuration settings.

## Page Used to Define Dispatch Board Configuration Settings

| Page Name | Object Name | Navigation | Usage |
|-----------|-------------|------------|-------|
| Dispatch Board Setup | RF_DISP_SETUP | Set Up CRM, Product Related, FieldService, Dispatch Board, Dispatch Board Setup | Define dispatch board configuration settings for the display attributes of each field service business unit. |

## Defining Dispatch Board Configuration Settings

Access the Dispatch Board Setup page.



Dispatch Board Setup page (1 of 2)

Dispatch Board Setup page (2 of 2)

## Display Options

| | |
|---|---|
| **10 Minutes** and **15 Minutes** | Select the smallest interval of time that a taskbar can represent on the dispatch board. If a task or the remaining part of a task is shorter than the selected time segment (for example, the task takes 8 minutes to complete and you select the 15-minute time segment), the taskbar covers the entire segment on the dispatch board. When you hover over the color-coded taskbar, the system displays the exact start and end times and other pertinent information for the task. |
| | **Note.** The 15-minute display option provides optimal performance for field service business units with high service order volumes or with large numbers of technicians within regions and provider groups. If you expect both service order and nonservice order tasks to last at least 15 minutes, select 15 Minutes. |
| **Display Start Hour** | Select the time when the 24-hour display begins on the dispatch board. By default, this value is *12:00 AM* (midnight). |
| | When you access the dispatch board for the first time, the system populates the Start Time field on the Dispatch Board page with the value that you specify here. The next time that you access the Dispatch Board page, the system populates the Start Time field with the previous value that you used in the dispatch board. |
| **Number of Technicians** | Enter the maximum number of technicians to display per page of the dispatch board. Each row of the dispatch board represents a technician's work schedule and availability. The number of rows that the system returns equals the number of active group members who are associated with the specified region or provider group. You can use the Next 10 and Previous 10 navigation arrows to display additional technician schedules that the system returns. |
| | **Note.** For optimal performance, display more than 10 technicians per page of the dispatch board. Though initial loading time increases with the number of rows that appear, this reduces the need to navigate through multiple pages of the dispatch board. |

## Legend Setup

The system populates this grid with status values for available service order activities and the default color that is associated with each status.

| | |
|---|---|
| **Status** | Select a status value for the service order activity. |

|  | **Note.** If you do not define a service order activity status here, service order activities with that status do not appear on the dispatch board. The dispatch board does not display service order activities with a *Complete, Closed,* or *Canceled* status. |
|---|---|

**Patterns**

Select the color and pattern that is associated with the service order activity status:

- *Blue Block*
- *Blue Stripes*
- *Blue Yellow Stripe*
- *Blue-Green Block*
- *Bright Green Stripe*
- *Dark Green Stripe*
- *Gray Stripes*
- *Green Block*
- *Light Blue Stripes*
- *Olive Orange Stripes*
- *Olive Stripes*
- *Orange Block*
- *Pink Green Stripe*
- *Pink Yellow Stripes*
- *Purple Block*
- *Red Stripes*
- *Red-Yellow Stripes*
- *Red-Orange Block*
- *Thin Blue Stripes*
- *Yellow Block*
- *Yellow Prink Stripe*
- *Yellow-Green Block*
- *Yellow-Orange Block*

**Display on Chart**

Select to have service order activities with the associated status value appear on the dispatch board. This check box is selected by default.

# Working with the Dispatch Board

Use the dispatch board to manage technician schedules and view and update service order statuses for a specified business unit.

This section discusses how to view and manage technician availability and service orders.

# Page Used to View and Manage Technician Availability and Service Orders

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Dispatch Board | RF_DISPATCH_BRD | FieldService, Dispatch Board, Dispatch Board | View and manage technician availability and service orders. |

# Viewing and Managing Technician Availability and Service Orders

Access the Dispatch Board page.



Dispatch Board page (1 of 2)

Dispatch Board page (2 of 2)

## Dispatch Board

Enter criteria for the service orders that you want to work with and click the Update Dispatch Board button. The system populates the page with the service order activities that match your criteria. To minimize data-entry effort, the system saves the unit, region ID, provider group, and start time every time that you click the Update Dispatch Board button during the session, and it populates these fields (except for the Unit field) on the page the next time that you access the dispatch board. The system populates the Unit field on the Dispatch Board page with what you define for the user on the User Preferences - Overall Preferences page.

**Note.** If a service order task spans multiple days, or if it starts or finishes at a time that goes beyond the assigned technician's normal working hours, the system codes the entire task duration (from start time through end time) with the color that you select for the corresponding service order status as one block of time. The system treats any nonworking hours within this period of time as part of the task.

| | |
|---|---|
| **Unit** | Enter the ID for the business unit that is associated with the service orders with which you want to work. The system returns all service order activities for the business unit that do not have a status of *Completed, Closed,* or *Canceled.* |
| **Region ID** and **Provider Group** | Enter a region ID or provider group. The system returns the work schedules of the active technicians in the provider group or region. By default, these fields contain the values, if any, that you entered in the last session. |
| **Date** | Enter the date of the assignment schedule. By default, the value is the current system date. |
| | Use the Previous Day and Next Day links to scroll through days before or after this date or enter the date manually. |

**Display Start Hour**          Select the time when the dispatch board display begins. When you first
                                access this page, the system populates this field with the display start time
                                that you define on the Dispatch Board Setup page. The next time that you
                                return to the page, the system populates this field with the value that you
                                entered in the last session.

                                ---
                                **Note.** The system automatically refreshes the page after entering a valid start
                                hour or date after you leave the field.
                                ---

**Update Dispatch Board**       Click to refresh the assignment schedule after entering new search criteria for
                                the unit, region ID or provider group, date, and time.

## Dispatch Board Assignment Grid

At the top of the grid, the time zone of the database server appears. The left column of the grid lists, in
alphabetical order, the name of each technician who is associated with the specified region or provider group.
Use the navigation controls at the top of the Technician column to view additional pages. Click the Daily
Calendar button next to the technician's name to access his or her work schedule.

The colored bars on each row of the assignment grid represent service order activity assignments and periods
of unavailability that are recorded on the associated technician's work schedule calendar for the 24-hour
period that appears. Place the cursor on a bar to see what the bar represents. The system uses a white bar to
display a technician's available hours that you define on the worker's schedule page. A gray bar represents a
technician's unavailable hours; these are nonworking hours, or when the technician is working on tasks that are
unrelated to service orders (for example, appointments, meetings, and so on). Click the Daily Calendar button
next to the technician's name to access the associated technician's daily work schedule on the Daily Calendar
page, where you can view details about the technician's nonservice order task or event. You cannot click gray
bars that represent a technician's nonworking hours.

Service order activity assignments for each technician appear in a color that indicates the status of the service
order activity. The legend below the assignment grid explains each color. Click the Service Order ID link to
access the Service Order page, where you can modify the status, priority, start and end dates and times, and
technician assignment for service order activities.

You can also modify this information for the service order activity without leaving the Dispatch Board page by
clicking the Expanded button for the service order activity.

---
**Note.** The Expanded button is used with the Assigned Service Orders and Unassigned Service Orders grid
below the display graph.
---

Urgent service order activities appear as a broken red stripe taskbar on the Dispatch Board. Conflicts in a
technician's schedule appear as an orange stripe. Click the orange stripe to access the Service Order page,
where you can resolve the schedule conflict.

Schedule conflicts occur in the dispatch board when multiple service order activities from different service
orders are assigned to a technician with overlapping times.

If two service order activities belong to different service orders and are both assigned to the 10:00 to 10:15
time segment, then this segment's link will take the user to the first of the two service orders.

---
**Note.** The system only displays conflicts if the actual start time of an activity overlaps with the end time
of the previous activity.
---

## Unassigned Service Orders and Assigned Service Orders

These grids list the open service orders that match the search criteria that you enter at the top of the page. To populate the Unassigned Service Orders tab, the system bases its search on the business unit and provider group or region. To populate the Assigned Service Orders page, the system finds matches based on the business unit, date, and provider group or region. Service order activities with a *Completed, Closed,* or *Canceled* status do not appear.

On both tabs, you can click the Service Order ID link or the Expanded button to access the service order information, where you can modify the status, priority, start and end dates and times, and technician assignments for the service order activities.

| | |
|---|---|
| ▽ Expand All | Click this button to expand all the assigned or unassigned service order information on the page. |
| ▷ Collapse All | Click this button to collapse all the assigned or unassigned service order information on the page. |
| **Save** | Click to update the individual service orders that were modified in the Assigned Service Orders and Unassigned Service Orders tabs. Clicking Save also refreshes the Dispatch Board page with the changes. |

## See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members"

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Using Calendars"

Chapter 7, "Creating and Managing Service Orders," page 63

# CHAPTER 11

# PeopleSoft Integrated FieldService Interactive Reports

This chapter provides an overview of PeopleSoft Integrated FieldService interactive reports and discusses how to:

• Set up PeopleSoft Integrated FieldService Interactive reports.

• Run PeopleSoft Integrated FieldService Interactive reports.

## Understanding PeopleSoft Integrated FieldService Interactive Reports

PeopleSoft CRM delivers these tools to help you manage your field service organization more effectively:

• Reports

• Interactive reports

These tools offer important information about your business process performance, which assists you in managing and tuning your business processes.

### Reports

PeopleSoft Integrated FieldService delivers four Crystal reports that are run using PeopleSoft Process Scheduler. These reports provide information on expenses, average time spent on service orders, and completed service orders within a predefined time period.

### Interactive Reports

PeopleSoft Integrated FieldService interactive reports, which are dynamic and interactive analytic reports, are an implementation of PeopleTools Analytic Calculation Engine (ACE). Interactive reports enable the viewer to move data elements around on a report and to view the report data using different dimensions. Viewing reports using different dimensions enables the viewer to gather valuable information about your service business.

Interactive reports also enable the viewer to perform "what-if" scenarios. "What if" capability is available in the Utilization Rate interactive report delivered with PeopleSoft Integrated FieldService. The user can modify the value of certain inputs of this report to represent a hypothetical situation. For example, modifying the hourly rate charged by a provider group to reflect a lower cost results in a corresponding decrease in the expense of unused value. By analyzing hypothetical situations, the user can make informed decisions about resource allocation.

PeopleSoft Integrated FieldService delivers three interactive reports:

• Service Order Aging Analysis

• Utilization Rate Analysis

• FieldService Dashboard

**See Also**

*PeopleSoft Enterprise Components for CRM 9 PeopleBook, "Using Interactive Reports"*

# Setting Up PeopleSoft Integrated FieldService Interactive Reports

To set up interactive reports for PeopleSoft Integrated FieldService, use the Date Configuration (RF_DATE_CONFIG) and Utility Setup (RF_UTIL_SETUP) components.

This section discusses how to:

• Configure the Service Order Aging interactive report.

• Configure the Utilization Rate interactive report.

**Note.**  You do not need to set up the FieldService Dashboard interactive report.

## Pages Used to Set Up PeopleSoft Integrated FieldService Interactive Reports

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Service Order Aging Date Configuration Options | RF_DATE_CONFIG | Set Up CRM, Product Related, FieldService, Service Order Aging Report, Service Order Aging Date Configuration Options | Configure the Service Order Aging interactive report. For each PeopleSoft Integrated FieldService business unit, define day ranges in which open service orders are categorized per business unit. |
| Utilization Rate Setup Options | RF_UTIL_SETUP | Set Up CRM, Product Related, FieldService, Utilization Rate Report, Utilization Rate Setup Options | Define configuration options, such as the period for day range validation, utilization goal, and cost category definitions for the Utilization Rate interactive report. |

## Configuring the Service Order Aging Interactive Report

Access the Service Order Aging Date Configuration Options page.

Service Order Aging Date Configuration Options page

**SeqNum** (sequence number)    Displays the order in which the day ranges appear on the interactive report as horizontal axis headings.

**From Day**                    Enter the start number for the day range. For example, enter *0* for a 0-4 day range.

**To Day**                      Enter the end number for the day range. For example, enter *4* for a 0-4 day range.

**Day Range**                   Enter the day range description.

# Configuring the Utilization Rate Interactive Report

Access the Utilization Rate Setup Options page.



Utilization Rate Setup Options page

### Period for Range Validation

| | |
|---|---|
| **Valid Range** | Enter the maximum duration (in days, weeks, months, or years) that a day range can be specified for the analysis. When you specify the start and end dates on the Utilization Rate page to run the interactive report, the system validates the dates with this period value to ensure that the duration of the day range does not go beyond the duration specified here. |
| | For example, you have set the period for range validation to three weeks. When you enter the start and end dates for the Utilization Rate interactive report, the system displays an error if the defined date range lasts more than three weeks. |

### Utilization Goal Definition

| | |
|---|---|
| **Utilization Goal** | Enter the number, in percentage, that represents how much of an hour technicians are expected to spend on work. The system populates this value on the Utilization Rate page. You can, however, override it. |

### Cost Category Definition

| | |
|---|---|
| **Cost Category** | Select the code of the cost category used to account for the labor time of members in the provider group by setID. Cost category codes are defined on the Cost Categories page. |

# Running PeopleSoft Integrated FieldService Interactive Reports

This section discusses how to:

- Work with the Service Order Aging interactive report.
- Work with the Utilization Rate interactive report.
- Work with the FieldService Dashboard interactive report.

## Pages Used to Run PeopleSoft Integrated FieldService Interactive Reports

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Service Order Aging - Existing Run Control | RF_SO_AGE_UPD | FieldService, Interactive Reports, Service Order Aging, Existing Run Control | Select an existing run control ID on the Existing Run Control page to run the Service Order Aging interactive report. You can also update any existing run control profiles, such as selecting a different business unit or customer before running the interactive report. Go to the Add New Run Control page (RF_SO_AGE_ADD) to add new run control profiles. |
| Utilization Rate - Existing Run Control | RF_UTIL_ CONFIG_UPD | FieldService, Interactive Reports, Utilization Rate, Existing Run Control | Select an existing run control ID on the Existing Run Control page to run the Utilization Rate interactive report. You can also update any existing run control profiles, such as entering a different start or end date, utilization goal, or different provider group before running the interactive report. Go to the Add New Run Control page (RF_UTIL_CONFIG_ADD) to add new run control profiles. |
| Service Order Summary - Existing Run Control | RF_MGMT_DASHBD_UPD | FieldService, Interactive Reports, Service Order Summary, Existing Run Control | Select an existing run control ID on the Existing Run Control page to run the Service Order Summary interactive report. You can also update any existing run control profiles, such as selecting a different provider group or customer before running the interactive report. Go to the Add New Run Control page (RF_MGMT_DASHBD_ADD) to add new run control profiles. |

## Working with the Service Order Aging Interactive Report

This section discusses:

• The usage of the Service Order Aging interactive report.

• Available parameters to run the interactive report.

• Available dimensions within the interactive report.

## Usage

The Service Order Aging Analysis interactive report shows, within the selected business unit, the age (in days) of all open service orders. The report provides field service managers, dispatchers, and other interested parties a summary of how long those service orders have remained opened since they were created. You can look at this report by customer or by product. The age of a service order is the result of the current system date minus the service order creation date.

You can set up day ranges under which service orders are categorized depending on their ages. Day ranges are used as the horizontal axis headings of the interactive report.

When you first run the interactive report on the Service Order Aging page, the system displays the Summary of Service Order report in the column chart view by default. Switch to the Summary of Service Order Aging report to view the report in the table view.

## Available Parameters

Access the Service Order Aging page. You can refine the result of the Service Order Aging Analysis interactive report using the these parameters in the run control page:

• Unit

  The Service Order Aging Analysis interactive report is business-unit based.

• Customer

  View open service orders for all or only a particular customer in the business unit.

## Available Dimensions

Use these dimensions to rearrange data on the Service Order Aging Analysis interactive report:

• Customer

• Product

• Date range

# Working with the Utilization Rate Interactive Report

This section discusses:

• The usage of the Utilization Rate interactive report.

• Available parameters to run the interactive report.

• Available dimensions within the interactive report.

## Usage

The Technician Utilization Rate Analysis interactive report calculates and displays the percentage of available working time that a provider group or its group members spent on servicing customers in a given period. This report enables field service managers to see how much time technicians spent on site handling customer service requests.

Based on inputs like provider group hourly rates, available working time, actual working time, and user-defined utilization goal, the report analyzes the amount of resources (in the currency value defined for the provider group cost category) wasted or needed within the selected time period in the operation.

To gather more information on what must be done to optimize the business, the manager can run what-if scenarios on the report by varying input values in a test case scenario.

For example, if the manager notices a significant amount of unused value in one of its provider groups, the manager can adjust values in the test case scenario (such as the utilization goal, provider group hourly rates, and technician working hours), examine the impact of these changes, and then decide where to adjust to yield the best business performance and revenue.

When you run the interactive report on the Utilization Rate page, the system automatically displays the Summary Utilization View report in the table view. Use the Utilization Rate View report to view the utilization rate of all members in the selected provider groups in line chart view. Use the Utilization % at Provider Group Level report to view the utilization rates among provider groups in column chart view.

## Available Parameters

Access the Utilization Rate page. You can refine the result of the Technician Utilization Rate Analysis interactive report using the these parameters in the run control page:

• Start and end dates

  Specify the start and end dates for the interactive report and make sure the defined duration does not exceed that specified in the Valid Range field. The value of both dates can be a past, current, or future date.

• Utilization goal

  This value appears by default from the Utilization Rate Setup Options page. You can, however, override it before running the interactive report.

• Provider group

  Run the interactive report for selected provider groups or for all provider groups.

## Available Dimensions

Use these dimensions to rearrange data on the Technician Utilization Rate Analysis interactive report:

• Provider group

• Technician

• Scenario

  Select *Base Case* to analyze actual data. Select *Test Case* to analyze a "what-if" scenario.

These data cubes are available in the interactive report:

• Hours available for technician

  The total amount of technician working hours within the period defined for the report. Technician working hours are specified using the Worker component.

• Hours on-site

  Compiled from all of the time logs created for the technician within the period defined for the report.

• Utilization % (utilization percentage)

  Hours on site divided by hours available for a technician.

• Utilization rate by group

The average utilization rate of all members in the group.

• Universal utilization goal

The utilization goal defined on the Utilization Rate page.

• Goal hours

The utilization goal times the hours available for a technician.

• Variance

The difference between goal hours and hours on site.

• Currency CD (currency code)

The currency code.

• Rate

The hourly rate of the provider group, which applies to its group member.

• Unused value

Variance times the hourly rate for the provider group. The hourly rate for the provider group is also used for
its group members. This rate is defined using the Provider Groups component.

# Working with the Service Order Summary Interactive Report

This section discusses:

• The usage of the Service Order Summary interactive report.

• The available parameters to run the interactive report.

• The available dimensions within the interactive report.

## Usage

The Service Order Summary interactive report offers a representation of all open service order activities
(these activities are associated with open service orders) that are assigned to all or selected provider groups
or customers on the day the report is run. Also available in the report are the total number of service order
activities with a priority of urgent, as well as service orders that have missed commitments.

When you run the interactive report, the system automatically displays the report in the table view. This report
provides a complete view of the analysis, which includes statistics on different service order activity statuses,
urgent service order activities, and missed commitments. There are other views in the report that enable you to
view specific data. Use the Urgent and Missed report to view statistics on urgent service order activities and
missed commitments. Use the Status Comparison report to view the number of service order activities in each
of these open activity statuses: accepted, hold customer, hold parts, and on site.

## Available Parameters

Access the FieldService Dashboard page. You can refine the result of the Management Dashboard Analysis
interactive report using these parameters in the run control page:

• Provider group

• Customer

## Available Dimensions

Use these dimensions to rearrange data on the Management Dashboard Analysis interactive report:

- Provider group

- Technician

- Customer

- Business unit

These data cubes are available in the interactive report:

- Open service orders

  Includes all service orders that are currently opened.

- Open service order activities.

  Includes all open service order activities (those not in the statuses of closed, completed, or canceled).

- Accepted service order activities

  Includes all service order activities in the accepted status.

- Hold customer service order activities

  Includes all service order activities in the hold customer status.

- Hold parts service order activities

  Includes all service order activities in the hold parts status.

- On site service order activities

  Includes all service order activities in the on site status.

- Urgent service order activities

  Includes all open service order activities with a priority of urgent.

- Missed commitment

  Includes all service order activities (which are not in the canceled status) that were unable to respond to customers or restore product functionality by the required response or restore time specified by the entitlement.

  A service order activity misses a response commitment if the least logged start date and time of the timelog exceeds the customer preferred or committed start date and time. Similarly, a service order activity misses a restore commitment if the maximum of the logged end date and time in the timelog exceeds the customer preferred or committed date and time. If a technician is unable to meet both the response and restore commitments in a service order activity, it is considered a single missed commitment incident and is reported under the name of the line's lead technician.

PART 5

# PeopleSoft Product Integration

**Chapter 12**
**Integrating with PeopleSoft Applications**

# CHAPTER 12

# Integrating with PeopleSoft Applications

This chapter discusses how to:

• Integrate with PeopleSoft Supply Chain Management (PeopleSoft SCM).

• Integrate with PeopleSoft Financial Management Services (PeopleSoft FMS).

• Integrate with PeopleSoft Human Resources Management (PeopleSoft HRMS).

## Integrating with PeopleSoft SCM

Material management functions and real-time item balance and availability checks in PeopleSoft Integrated FieldService require integration with inventory and purchasing systems. If you are integrating with PeopleSoft Inventory and PeopleSoft Purchasing in the PeopleSoft SCM product line, refer to the information in the following section.

### See Also

Chapter 8, "Ordering and Receiving Materials," page 109

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Checking Item Balances and Availability"

## Activating Application Message Enterprise Integration Points

Material management transactions require these application message enterprise integration points (EIPs):

• Business Unit EIP

• Item Master EIP.

• Customer EIP

• Product EIP

• Purchase Order Requisition EIP

• Inventory Adjustment EIP

• Interunit Receiving EIP

• Purchase Order Receipt EIP

• Item Balance EIP

• Get Purchase Order Interunit EIP

• Service Inventory EIP

• Advanced Shipping Notice EIP

As delivered, PeopleSoft EIP application messages are inactive. In both PeopleSoft CRM and PeopleSoft SCM, you must activate the required application messages, set the queue statuses to run, activate service operations, associate logic to handlers (which are defined on service operations), and define the service operations for the transactions and relationships that you will be using.

Depending on the rules governing creation and updates for installed products, an installed product may exist if an order for the material was placed using PeopleSoft Order Capture, Order Capture Self Service or if an automatic shipping notification (ASN) message for the item was sent to the PeopleSoft CRM system.

If an installed product exists, the system updates the status of the record by using the rules that are established on the Installed Product page of the Product Definition component.

Also if a user creates an order in Order Management in PeopleSoft SCM, and the order undergoes the complete fulfillment cycle on the SCM side, then the advanced shipping notice, when received in CRM from Inventory, will directly create an installed product as per the configuration in the Product Definition component.

**Note.** If you are using PeopleTools 8.47 for your Supply Chain Management (SCM) applications, refer to the PeopleTools PeopleBooks for the 8.47 release.

### See Also

*Enterprise PeopleTools PeopleBook: Integration Broker*

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services"

## Setting Up Item Balance and Get Purchase Order Messages

For the Item Balance EIP activate these request and response messages:

• ITEM_BALANCE_REQ

• ITEM_BALANCE_RSP

For the Get PO IUT EIP activate these request and response messages:

• GET_POIUT_REQ

• GET_POIUT_RSP

## Defining Inventory Business Units

Define business units in PeopleSoft Inventory for storage locations in your field service trucks. These truck inventory business units should be separate from the inventory business units that represent your distribution warehouses. As the integration is designed, stock requested on orders that are initiated from a field service truck and fulfilled from inventory stores is transferred to the truck with an interunit transfer. This integration design assumes that the truck stock storage location is in a different business unit than the stock used to fulfill the material order.

If both the truck stock storage location and the fulfillment stock are in the same business unit, you must perform a bin-to-bin transfer within the inventory business unit to move the required material to the trucks. This material movement transaction within PeopleSoft Inventory would not provide warehouse staff with a pick list for the required move, nor would it support receiving transactions at the truck.

For the inventory business units that represent field service trucks, turn off soft reservation processing and exclude the truck business units from distribution networks. Stock in truck storage locations should not be available to fulfill sales orders and material stock requests.

Because the order of positive and negative adjustment transactions to inventory storage locations cannot be predicted, set up your inventory business units to enable transactions to drive inventory quantity balances negative.

### See Also

*PeopleSoft Enterprise Inventory PeopleBook*

# Defining Storage Locations for FieldService Truck Stock

After defining inventory business units representing field service trucks in PeopleSoft Inventory, define storage locations within the inventory business units that represent good and defective storage locations on your field service trucks. In PeopleSoft CRM, use the Storage Locations page in the Worker component to associate one good truck stock location and one defective truck stock location with each member of your provider groups.

When defining storage areas in PeopleSoft Inventory, represent each field service truck as a storage area, with storage levels within the area representing the good and defective locations for the truck. This model facilitates searching and reporting on truck stock storage areas in PeopleSoft Inventory.

Define the good truck storage locations as netable and the defective truck storage locations as non-netable in PeopleSoft Inventory. For implementations that include PeopleSoft Enterprise Planning or PeopleSoft Production Planning, defining defective truck storage locations as non-netable prevents planning processes from counting the defective or returned stock in these locations as available.

On the Storage Location page in the Worker component in PeopleSoft CRM, business units defined in PeopleSoft SCM are available for selection if the Business Unit EIP has been implemented. The business unit prompt includes all business units; the system does not filter by inventory business units. Additionally, there are no prompts for the storage location definition fields. Your data-entry staff must know the correct inventory business unit to select and the correct storage location information to enter. Carefully check the storage locations entered in PeopleSoft CRM for accuracy. For material movement transactions initiated from the Order Materials and Service Order component to be successfully recorded in PeopleSoft Inventory, the storage locations entered in PeopleSoft CRM must define a valid storage location for the inventory business unit referenced in the IN Unit (inventory unit) field on the Storage Location page.

The good truck storage location is used on receipt and material usage transactions initiated from the Order Materials and Service Order component. The defective truck storage location is used for material removal transactions initiated from the Service Order component.

When you perform an Item Balance By Group Member inquiry in PeopleSoft CRM, only item balances from good truck storage locations appear.

### See Also

*PeopleSoft Enterprise Inventory PeopleBook*

## Defining Items

Item information in PeopleSoft CRM must be synchronized with item information in PeopleSoft SCM. Although you can manually enter item information in PeopleSoft CRM, it's better to use the Item Master EIP to populate item tables in PeopleSoft CRM with the master item data in PeopleSoft SCM. Once the Item Master EIP is activated, however, the pages of the Item Definition component in PeopleSoft CRM can be used only to view item information. You cannot add or update item definitions in PeopleSoft CRM.

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

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

### See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Defining Items"

## Defining Interunit Transfer Defaults

When you define interunit transfer defaults for your inventory business units using the Interunit Transfer Setup component in PeopleSoft Supply Chain Management, clear the Flag Items for Auto-Putaway check box for destination business units that represent field service trucks. You must clear this check box to require a receipt transaction to be performed against all interunit receipts. When the Flag Items for Auto-Putaway check box is selected, PeopleSoft Inventory automatically sets the status of the interunit transfer to *Received* without requiring a receipt transaction. If the status of the receipt is *Received,* PeopleSoft CRM cannot retrieve the expected receipt information for the order on the Order Materials page.

### See Also

*PeopleSoft Enterprise Inventory PeopleBook*

*PeopleSoft Enterprise Cost Management PeopleBook*

## Setting the Automatic Receiving Option for FieldService Business Units

When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders initiated from the Service Order component can be automatically received. In environments without automatic receiving, technicians must enter receiving information for a material shipment before they can record usage of the material.

With automatic receiving, technicians enter only usage information (the quantity used and the quantity not used) from which the system automatically derives and posts the appropriate receiving transactions. Select the automatic receiving option that best meets your business practices. Neither option offers significant data-entry advantages, and the material management transactions produced in both automatic and manual receiving environments are identical.

With autoreceiving turned on, the receipt of materials comes into the system through the Service Order component. If you are not using autoreceiving, the receipt of materials comes into the system through the Order Materials component.

## Defining Defaults and Procurement Options for Requisition Processing

Field service business units in PeopleSoft CRM must be defined as a valid source of requisitions in PeopleSoft SCM. Using the Requisition Loader Defaults component in PeopleSoft SCM, you define each field service business unit as a loader business unit and establish processing defaults for requisitions staged by the field service business unit, including the PeopleSoft Purchasing business unit that will process the requisitions.

When defining procurement options in PeopleSoft SCM, you can use the Ship To Locations page to associate a field service business unit with an appropriate distribution network. Sourcing processes in PeopleSoft Purchasing can be configured to check available quantity in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, an interunit transfer is created to fulfill the requisition. Inventory business units representing field service trucks should not be included in distribution networks.

Because it's a one-way sync from the PeopleSoft FIN/SCM database to the PeopleSoft CRM database, you must add PeopleSoft Integrated FieldService business units to the PeopleSoft FSCM database.

### See Also

*PeopleSoft Enterprise Purchasing PeopleBook*

*PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

*PeopleSoft Enterprise Inventory PeopleBook*

## Understanding Requisition IDs

For requisitions initiated from the Order Materials component in PeopleSoft CRM, the system builds a requisition ID by combining the material header ID and the material line number. Material header IDs are created through automatic numbering and are a maximum of eight digits. The material line number is two digits.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options"

## Defining Valid Requisition Requester IDs

Every requisition generated in PeopleSoft CRM includes a requester ID, representing the person or entity that initiates a requisition request. For requisitions initiated from the Order Materials page, the system populates the Requester field with the default requester ID defined on the User Preferences - Overall Preferences page. You can enter an alternate requester ID as necessary; however, the requester ID on requisitions staged in PeopleSoft Purchasing must be defined as a valid requester ID in PeopleSoft SCM. Requesters are established on the Requester Setup page in PeopleSoft SCM under Structure Procurement Options.

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

### See Also

*PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

*PeopleSoft Enterprise Purchasing PeopleBook*

## Correcting Transaction Errors

Correct errors in transactions staged to PeopleSoft SCM using the error correction pages in PeopleSoft SCM. For example, if a material management transaction is sent to PeopleSoft SCM using an invalid storage location, the transaction remains staged until the error is corrected in PeopleSoft SCM. After correction, you can reprocess the transaction.

## Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

When using the Order Materials component within the portal, users can link to the Requisition Workbench component in PeopleSoft Purchasing and the Item/Product Availability component in PeopleSoft Inventory. Implementation of these links depends on where the portal is installed in your system. To correctly install the portal define content reference for PeopleSoft SCM in the ERP node under the portal content tab.

### See Also

*Enterprise PeopleTools PeopleBook: Internet Technology*

# Integrating with PeopleSoft Financial Management Services

You can integrate with PeopleSoft FMS to bill and book revenue for recurring and on demand services that are initiated in PeopleSoft CRM. For service order and case transactions, on demand services are always onetime charges. Agreement fees, however, can be recurring and also go through the Transaction Billing Processor.

Once you establish the integration to the Transaction Billing Processor, users send agreement fees, service order fees (including service, material, time, and expense fees), and case fees to the Transaction Billing Processor from the Billing pages in PeopleSoft Integrated FieldService and PeopleSoft Call Center.

PeopleSoft CRM sends only those transactions to the Transaction Billing Processor that are ready to be billed.

For agreement fee transactions that can be recurring, the system sends the transactions for future fees from PeopleSoft CRM. The frequency and amount to be billed, is determined on PeopleSoft FSCM side.

The Transaction Billing Processor does not modify PeopleSoft CRM transactions. It may, however, split the fees so that they can be billed periodically. The Transaction Billing Processor enables the ability to recognize revenue periodically as well. Once you establish the integration, all agreement-based and on-demand transactions are sent to PeopleSoft Contracts. Use the set up pages in PeopleSoft Billing, PeopleSoft Contracts, and PeopleSoft General Ledger to recognize revenue, initiate billing cycles, set up schedule details, and establish account rules for applying revenue to the general ledger.

Information on setting up an integration to the Transaction Billing Processor for billing can be found in the following PeopleBooks.

**See Also**

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Setting Up an Integration to the Transaction Billing Processor"

*PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Managing Cases," Entering Case Information

Chapter 7, "Creating and Managing Service Orders," Recording Billing Information, page 103

*PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "Integrating with Fulfillment and Billing Systems," Integrating with Billing Systems

# Integrating with PeopleSoft Human Resources Management

You can integrate with PeopleSoft HRMS to populate PeopleSoft CRM tables with workers and competency information associated with your workers.

## See Also

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Integration with PeopleSoft HRMS or Third-Party HR Data

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Managing Workforce Competencies"

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers"

## Activating Application Message EIPs

In PeopleSoft CRM, you can enter competencies, competency proficiency ratings, and competency assignments online using components within PeopleSoft CRM. However, if you are integrating with PeopleSoft HRMS, use the Person Competency EIP to synchronize your system tables with the competency information defined in PeopleSoft HRMS.

Similarly, you can maintain worker records in PeopleSoft HRMS or a third-party human resources system and move the worker data to PeopleSoft CRM by implementing the Workforce Data EIP.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers".

As delivered, PeopleSoft EIP application messages are inactive. In both PeopleSoft CRM and PeopleSoft HRMS, you must activate the required application messages of the Person Competency EIP, set the queue statuses to run, activate service operations, associate logic to handlers (which are defined on service operations), and define the service operations for the transactions and relationships that you will be using.

Note that PeopleSoft CRM is a subscriber to Person Competency EIP messages, not a publisher. Any changes made to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with PeopleSoft HRMS. All updates to competency records should be made in PeopleSoft HRMS and published to PeopleSoft CRM.

**See Also**

*Enterprise PeopleTools PeopleBook: Integration Broker*

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services"

# Setting the Use Only Evaluation Type Option in PeopleSoft CRM

Before assigning competencies on the Competency Assignment page in PeopleSoft CRM, you must set the Use Only Evaluation Type field on the General Options page under Set Up CRM, Install, Installation Options.

The Person Competency EIP loads competency data with all evaluation types in PeopleSoft CRM. Specifying an evaluation type at installation enables the system to limit the competency records that can be selected on CRM pages. Although the evaluation type does not appear in PeopleSoft CRM, the pages in PeopleSoft CRM display only the competency records that match the specified evaluation type.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up PeopleSoft Enterprise CRM Application Installation Options

# APPENDIX A

# PeopleSoft Integrated FieldService Reports

This appendix provides an overview of PeopleSoft Integrated FieldService reports and enables you to view summary tables of all reports.

**Note.** For samples of these reports, see the PDF files published on CD-ROM with your documentation.

### See Also

Chapter 11, "PeopleSoft Integrated FieldService Interactive Reports," Setting Up PeopleSoft Integrated FieldService Interactive Reports, page 150

Chapter 11, "PeopleSoft Integrated FieldService Interactive Reports," Running PeopleSoft Integrated FieldService Interactive Reports, page 152

*Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

# PeopleSoft Integrated FieldService Reports: General Description

This table lists the PeopleSoft Integrated FieldService reports, sorted alphanumerically by report ID. All of the reports are Crystal reports.

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|---|
| RFC5000 Dispatch Performance | Shows, by customer, the percentage of service orders completed each month. On the run control page, select the business unit, customer (optional), and date range for the report. | FieldService, Reports, Dispatch Performance | RUN_RFC5000 |
| RFC5001 Expense Report by Product | Shows, by region, monthly expenses for products that were serviced. On the run control page, select the business unit, currency code, region (optional), and date range for the report. | FieldService, Reports, Expenses by Product | RUN_RFC5001 |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|---|
| RFC5001A<br>Expenses by Customer | Shows, by region and customer, monthly expenses for products that were serviced. On the run control page, select the business unit, currency code, region (optional), customer (optional), and date range for the report. | FieldService, Reports, Expenses By Customer | RUN_RFC5001A |
| RFC5002<br>Mean Time to Repair | Shows, by region and customer, the average time spent on service orders each month. On the run control page, select the business unit, region (optional), customer (optional), and date range for the report. | FieldService, Reports, Mean Time To Repair | RUN_RFC5002 |
| RFC5006<br>Service Order Estimate | Provides an estimate of the cost that is planned to perform the service. | Click the Estimate Report button on the toolbar from the Service Order page or the My Service Order page. | Not Applicable |
| RFC5005<br>Service Order Detail | Lists the work that the technician has to perform to fulfill the requirements of the service order. | Click the Detail Report button on the toolbar from the Service Order page or the My Service Order page. | Not Applicable |

# 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**
In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

**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 *receivables specialist*. 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 *detailed business process*. |
| **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 *course*. |
| **Class ChartField** | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.* |
| **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 *copy* 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 *population* and *division*. |
| **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 *communication key.* |
| **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 *comm keys* or *speed keys*) can be created for background processes as well as for specific users. |

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| **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*.

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| **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.<br><br>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.<br><br>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. |

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| **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 *population* and *cohort.* |
| **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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result. |
| **elimination set** | In PeopleSoft 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. |

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| **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 *donor pyramid* 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 *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.<br><br>See also *business unit.* |
| **GL entry template** | Abbreviation for *general ledger entry template.* 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 *General Ledger Interface process.* 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).<br><br>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 *update access*.

**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 ADVANCED_SHIPPING_ORDER 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.

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| **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 *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined. |
| **LDIF file** | Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| **library section** | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it. |
| **linked section** | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section. |
| **linked variable** | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable. |
| **LMS** | Abbreviation for *learning management system.* 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.

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| **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 *1*—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 *3C engine*. |
| **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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration. |
| **merchandising activity** | In PeopleSoft 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 SQLExec function, and PeopleSoft Application Engine programs. |
| **metastring** | Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform. |
| **multibook** | In PeopleSoft 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 *need analysis*.

**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 *compensation object*.

**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 *event*.

**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 *division* and *cohort*.

**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.

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| **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. |

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| **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 *record input value-added tax flag.* 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 *record output value-added tax flag.* |
| | See *record input VAT flag.* |
| **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). |

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| **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 *real-time event notification server* 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 *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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. |

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| **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** | 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. |
| | In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training. |
| **session template** | In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern. |
| **setup relationship** | In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node. |
| **share driver expression** | In PeopleSoft 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. |

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| **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 *communication key.* |
| **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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built. |
| **syndicate** | To distribute a production version of the enterprise catalog to partners. |

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| **system function** | In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger. |
| **system source** | 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). |
| | 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). |
| **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 *Communications, Checklists, and Comments engine.* 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 *Communications, Checklists, and Comments group.* 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. |
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| 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 *locked*) 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 *inquiry access*. |
| 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 *value-added tax exception*. A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension. |
| VAT exempt | Abbreviation for *value-added tax exempt*. Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery. |

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| **VAT exoneration** | Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization. |
| **VAT suspension** | Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT. |
| **warehouse** | A PeopleSoft 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 *eXtended Process Integrator.* 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 *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

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