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PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft 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 Enterprise Customer Relationship Management Application Fundamentals Preface

This preface discusses:

• Additional resources.

• PeopleSoft Enterprise Customer Relationship Management (CRM) business object management.

• PeopleSoft Enterprise CRM product and item management.

• PeopleSoft Enterprise CRM automation and configuration tools.

• PeopleSoft Enterprise CRM services foundation.

• PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website.

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
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
PeopleBook documentation updates	Support, Documentation, Documentation Updates

Resource	Navigation
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade Documentation	Implement, Optimize + Upgrade, Upgrade Guide

PeopleSoft Enterprise 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.

See Also

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

PeopleSoft Enterprise CRM 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, "PeopleSoft Enterprise CRM Product and Item Management Preface"

PeopleSoft Enterprise 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 PeopleSoft CRM applications. This is an essential companion to the PeopleSoft CRM Application Fundamentals PeopleBook.

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* contains these parts:

• 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), 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, "PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Enterprise CRM Services Foundation

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

The *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook* contains these parts:

• Solution Management.

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

• 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 activity through Map Dashboard.

• Transaction Billing Processor Integration

  PeopleSoft FieldService, PeopleSoft Order Capture, and PeopleSoft CRM call center applications can integrate with the Transaction Billing Processor or any third-party billing applications to send agreement, service order, case fees, order capture service and product agreement information to the Transaction Billing Processor. You can also generate invoices for services, cases and agreement fees, and manage and book revenue to the appropriate general ledger accounts for recurring and one-time purchases of services and products.

See Also

PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook, "Oracle's PeopleSoft CRM Services Foundation Preface"

PeopleTools PeopleBooks

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

PART 1

Getting Started

Chapter 1
**Getting Started with PeopleSoft Enterprise Customer Relationship Management 9
Applications**

CHAPTER 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 9 Applications

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) and discusses:

- PeopleSoft CRM cross-product integrations.
- PeopleSoft CRM cross-product implementation.

PeopleSoft Enterprise CRM 9 Application Fundamentals Overview

This book contains essential information describing the setup and design of PeopleSoft CRM and the use of features that are common to multiple applications within PeopleSoft CRM, including information on:

- Setting up installation, basic system tables, and security options.
- Setting up and using features that are common to multiple PeopleSoft CRM applications, such as notes, search collections, alternate character, interactive reports, and diagnostic reports.
- Administering worker information.
- Setting up and using interactions and 360-degree views.
- Setting up and using self-service applications.
- Managing relationships with customers.
- Setting up agreements and warranties.
- Managing the portfolio of products that you offer.

Note. This book documents the mechanics of setting up and using common PeopleSoft CRM functionality. The use of that functionality within a business process, such as order capture or support, is discussed in the application PeopleBook.

PeopleSoft Enterprise CRM 9 Cross-Product Integrations

PeopleSoft CRM applications integrate with each other and with other external systems. Application-specific integrations are discussed in the application-specific PeopleBooks. The following integrations apply to multiple products:

- Integration with PeopleSoft Human Resources Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data.

- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer and product data across systems, which enables many transactions within PeopleSoft CRM, such as manage materials in PeopleSoft Integrated FieldService and PeopleSoft Support and order taking and tracking in PeopleSoft Order Capture.

- Integration with PeopleSoft SCM and Financial Management Solutions enables you to display billing information and payment information that is associated with customers in the PeopleSoft CRM 360-Degree View.

- Integration with the PeopleSoft business analysis modeler enables you to view realtime multidimensional interactive reports that help you analyze and monitor the key performance indicators in your enterprise.

- Integrations that enable the PeopleSoft CRM system to exchange customers with personal information managers such as Microsoft Outlook or Lotus Notes.

- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support and the PeopleSoft collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information.

PeopleSoft Enterprise CRM 9 Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks based on the features that you are implementing. Setup tasks include:

- A list of components that you must set up.

   This list is the order in which you must setup the components and enter data into them

- Links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of implementation, 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 appears in the preface of the *PeopleSoft Enterprise CRM Business Object Management PeopleBook,* with information about where to find the most current version of each.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode API Reference

PART 2

CRM Multi-Product Foundation

Chapter 2
Working with Business Units and TableSet Controls

Chapter 3
Setting Up General Options

Chapter 4
Setting Up Security and User Preferences

Chapter 5
Working with Notes and Attachments

Chapter 6
Using Interactive Reports

Chapter 7
Setting Up Currencies

Chapter 8
Setting Up Credit Card Encryption

Chapter 9
Implementing Alternate Character

**Chapter 10
Setting Up Auditing for Cases and Inbound Email**

**Chapter 11
Running Diagnostic Reports**

CHAPTER 2

Working with Business Units and TableSet Controls

This chapter provides overviews of business units and TableSet controls in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to define TableSet controls.

Understanding Business Units in PeopleSoft Enterprise CRM

This section discusses:

• Business unit structure.

• Uses of business units in PeopleSoft Enterprise CRM.

Business Unit Structure

A business unit represents an operational entity for an application. The structure of a business unit depends on the requirements of the PeopleSoft Enterprise CRM application in which the business unit is defined. For example, you might structure a sales organization (and thus the PeopleSoft Sales CRM business units) on region lines but structure a support organization (and thus the PeopleSoft Support CRM business units) around different product lines.

Using business units enables you to group transactions for reporting purposes. Business units do not have predetermined restrictions or requirements. You can define business units to reflect departmental functionality, along product lines, or by location. An entire organization might have only one business unit if every department uses the same processing rules. Diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

PeopleSoft does not deliver predefined business units. You decide how to implement business units in PeopleSoft applications to reflect the structure of the enterprise. Business units are usually specific to individual applications: for example, you set up field service business units for the PeopleSoft Field Service application and Sales business units for the PeopleSoft Sales application. However, some applications can share business units. For example, PeopleSoft Support and PeopleSoft Help Desk are both call center applications and can use the same business unit because the nature of their applications is similar.

You can also relate business units across integrated applications. For example, you can associate call center business units with field service business units for service order integration and with sales business units for sales lead integration.

Warning! After you define a structure, you cannot delete a business unit—you can only inactivate it. Before creating and securing business units, think carefully about how you want to set up the organizational structure and about what information you want groups of users to access.

Uses of Business Units in PeopleSoft Enterprise CRM

Transactional data in PeopleSoft Enterprise CRM is associated with business units. For example, leads belong to PeopleSoft Sales business units, and service orders belong to PeopleSoft Field Service business units.

Business units can control the following types of processing:

• Business logic.

  Some features are enabled and disabled at the business unit level rather than at the application level. For example, PeopleSoft Field Service enables automatic receiving by business unit.

• Reporting and analysis.

  You can report and summarize information by business unit. For example, several reports that are in PeopleSoft Support and PeopleSoft HelpDesk filter data based on business unit.

• Default values.

  Values often appear by default for every transaction that is associated with a business unit. For example, the currency value appears by default for each Sales business unit.

• Filtering of values for prompt fields.

  Prompt fields on PeopleSoft transactions components are often populated differently based on business unit. For example, in PeopleSoft Support you might set up one business unit to handle software issues and another to handle hardware issues. The values that are available to each business unit for the case type and product fields differ depending on whether the business unit that handles the case is set up for software or hardware cases.

• Security.

  Business units enable you to control row-level security. You can control access to setIDs by user or permission list.

  See Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 60.

Use of Business Units by CRM Applications

You can use the same business unit across applications. You create the business unit in one application, then use each application's setup component to associate the business unit with each application that uses the business unit.

See Chapter 2, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls, page 14.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "Defining PeopleSoft Marketing Business Units"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Defining Order Capture Business Units"

PeopleSoft Enterprise Sales 9 PeopleBook, "Setting Up Business Units for PeopleSoft Enterprise Sales"

Understanding TableSet Controls in PeopleSoft Enterprise CRM

This section discusses:

• TableSet control terminology

• TableSet control scenarios

• TableSet control example

TableSet Control Terminology

The TableSet control architecture uses the following terminology:

TableSet

TableSets are groups of control tables that enable you to share the same control values among multiple business units. This reduces data redundancy by enabling multiple business units to access shared information while keeping information such as departments decentralized. You can use business units and TableSets to associate a business unit with individuals in the enterprise or to specify default values for a business unit's transactions.

TableSets also enable you to limit data access by associating the business unit with a list of record groups, each of which is associated with a setID. The setID in turn is associated with one or more values that are in a control table.

SetID

SetIDs are the labels that identify a TableSet. SetID functionality in PeopleSoft Enterprise CRM provides a higher business level for rollup of business unit data in reports and for other purposes. Just as business units organize the company or organization, setIDs organize data within the system.

Business units are used to group and filter transactions, and setIDs are used to group and filter the setup data. To create logical groupings of values, you associate setIDs with each value.

For example, you might have two call center business units, one for U.S. operations and one for European operations. If you sell different products in the U.S. and Europe, then you use two setIDs with the products: one for U.S. products, and one for European products. You can associate these different product setIDs with the two call center business units to ensure that call center agents in each geographic region see only products that are sold in that region. You can also use setIDs to group the different case types that are handled by the call centers.

Some PeopleSoft tables (control tables and prompt tables) use a setID as a high-level key to identify and retrieve data from system databases. The setID segregates the data in the control tables, which enables many business units to share the same set of data on the physical table in the system by grouping values for filtering purposes.

SetIDs are shared across applications. For example, all PeopleSoft Enterprise CRM business units have TableSet controls that determine valid products for each business unit. Therefore, when you establish product setIDs, you need to consider how products appear in each PeopleSoft Enterprise CRM application that you plan to implement.

Control (or Setup) Table

Control tables enable you to establish values for fields that are in transactional pages. For example, the Case Type control table contains all the valid case types. When a support agent opens a case, the Case Types table supplies the list of valid types from which the support agent can select.

Record Group

Record groups contain similar setup tables. For example, some record groups are specific to call center setup tables. There is one record group for the tables that contain problem attributes (case type, category, and so forth), another record group for tables that contain impact attributes (priority and severity), and so on. Additional record groups control setup tables (for example, products and solutions) that are shared with other applications.

Setup components in the same record group must use the same setID for a given business unit. For example, suppose you have two different business units with two different setIDs and you also want to separate case type by setID. Because case type is in record group RC-03 and category, type, and details are also in that record group, you must also assign different setIDs for category, type, and details if you have different setIDs for different case types.

When a record is in a given record group, views that contain the record are also in the record group if the views are keyed by setID. Related language records do not necessarily appear in the record group.

PeopleSoft-delivered setup tables are already organized into record groups. Not all record groups are relevant to all business units. For example, case attribute record groups are relevant to call center business units, but not to sales business units. You can look at the TableSet definition for an existing business unit to see which record groups are used by which application.

TableSet Controls

TableSet controls associate business units with record groups and setIDs. Each business unit has its own TableSet control, which is stored on the TableSet Record Group Control table. You can associate a setID for each individual record group to a business unit.

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term set control field.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

TableSet Control Scenarios

Not every organization needs to use the more complex TableSet control capabilities. Consider these scenarios as you decide how to use TableSet controls:

• You have only one business unit.

   All of the setup data is valid for that business unit. Therefore, you only need one setID. When you create the business unit, specify this setID as the default. The system creates the TableSet control.

• Multiple business units use all the same setup data.

   All of the setup data is valid for all business units. Therefore, you still only need one setID. When you create business units, specify this setID as the default for all business units, and the system creates TableSet controls.

- Multiple business units use separate sets of setup data.

  In this scenario, you have one set of setup data for each business unit. Therefore, you need one setID per business unit. As you create each business unit, you specify its default setID. Once again, the system creates TableSet controls for you.

- Multiple business units use some shared setup data and some unique setup data.

  This is the only scenario in which you have to configure the TableSet controls. The business units use different setIDs for different record groups, and therefore the default setID is not valid for all record groups. You still specify a default setID when you create each business unit, but you must override the default later.

TableSet Control Example

The following diagram illustrates the most complex TableSet control scenario: multiple business units use some shared setup data and some unique setup data.

The diagram represents the business units and setIDs that are established by an organization with three call center business units, one for its U.S.-based help desk operations, one for its U.S. support operations, and one for its European support operations.

The organization has these requirements for sharing setup data:

- There are two sets of case problem attributes (record group RC_03): one for the two support business units and one for the help desk business unit.

- There is one set of case impact attributes (record group RC_04); all three business units share the values.

- There are two sets of communication channel attributes (record group RC_07): one set for the U.S.-based business units and one for the European business unit.

This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs:

Your Business Units   **Delivered by PeopleSoft**

| Business
Units | TableSet
Control | Record
Groups | Setup
Tables |

HelpDesk

REC GROUP	SetID
RC_03	HDESK
RC_04	SHARE
RC_07	SHARE

BU HelpDesk

Support US

REC GROUP	SetID
RC_03	SUPRT
RC_04	SHARE
RC_07	SHARE

BU Support US

Support EUR

REC GROUP	SetID
RC_03	SUPRT
RC_04	SHARE
RC_07	EUR01

BU Support EUR

RC_03 Case Problem Attributes

Case Type → A

Category → B

RC_04 Case Impact Attributes

Priority → C

Severity

RC_07 Communication Channels

Source → D

Contact Method

Business units, SetIDs, and TableSet controls

Your SetIDs

Setup Table Values   **SetIDs**

Case Type	
SetID	**Value**
SUPRT	Problem
	Service Order
	RMA
HDESK	Problem
	Change Req

SetID
SUPRT

A

Category	
SetID	**Value**
SUPRT	Dishwashers
	Refrigerators
HDESK	Hardware
	Software

B

SetID
HDESK

Priority	
SetID	**Value**
SHARE	Low
	Standard
	High
	Critical

C

SetID
SHARE

Source	
SetID	**Value**
SHARE	Self-Service
	Telephone
	Email
EUR01	Telephone
	Email

D

SetID
EUR01

Business units, SetIDs, and TableSet controls

Notice the following details in the diagram:

• Values that are valid for more than one setID are entered for each setID for which they are valid.

For example, both the help desk business unit and the support business units have a case type of *Problem*. The different business units cannot share this value because they are associated with different setIDs. Therefore, the problem case type is set up twice in the Case Type table: once under the HDESK setID, and once under the SUPRT setID.

Setting up case types is simple, involving only a setID, a unique identifier, and descriptive information. But for more complex setup tables (for example, the product table), duplicate data becomes difficult to maintain. The more complex the setup tables are, the more you have to gain by sharing values across business units.

• The Case Type table is part of the record group for case problem attributes (RC_03). Therefore, the values for all tables that are in the RC_03 record group are split into help desk values (associated with the HDESK setID) and support values (associated with the SUPRT setID).

• The preceding diagram illustrates two different ways of handling setIDs when values are shared by some, but not all, business units:

  - You can have setIDs that correspond to the specific groups of values, as the setup for the record group for case problem attributes (RC_03) illustrates: there is one setID for the support business unit and another setID for the help desk business unit.

  - You can use a general-purpose setID, such as SHARE, for shared values and use other setIDs on an exception basis, as the setup for the communication channels record group (RC_07) illustrates.

• The system uses the default SETID table to determine default values for the setIDs that are associated with each record group in a new business unit. For example, a setID US100 might use US100 for most setIDs but use SHARE for departments. If you define US100 as the default setID for the a new business unit, then the new business unit also uses US100 for all setIDs except departments, for which it uses SHARE.

Defining Business Units and TableSet Controls

To define tablesets, use the TableSet ID (SETID_TABLE) component.

This section provides an overview of the TableSet control setup process and lists the pages used to define TableSet controls.

TableSet Control Setup

When you create a new business unit, the system creates a setID with the same name as the business unit. The newly created TableSet control associates all record groups with that setID. This is a convenient shortcut when you have multiple business units with identical or similar TableSet controls.

This diagram illustrates the TableSet control setup process.
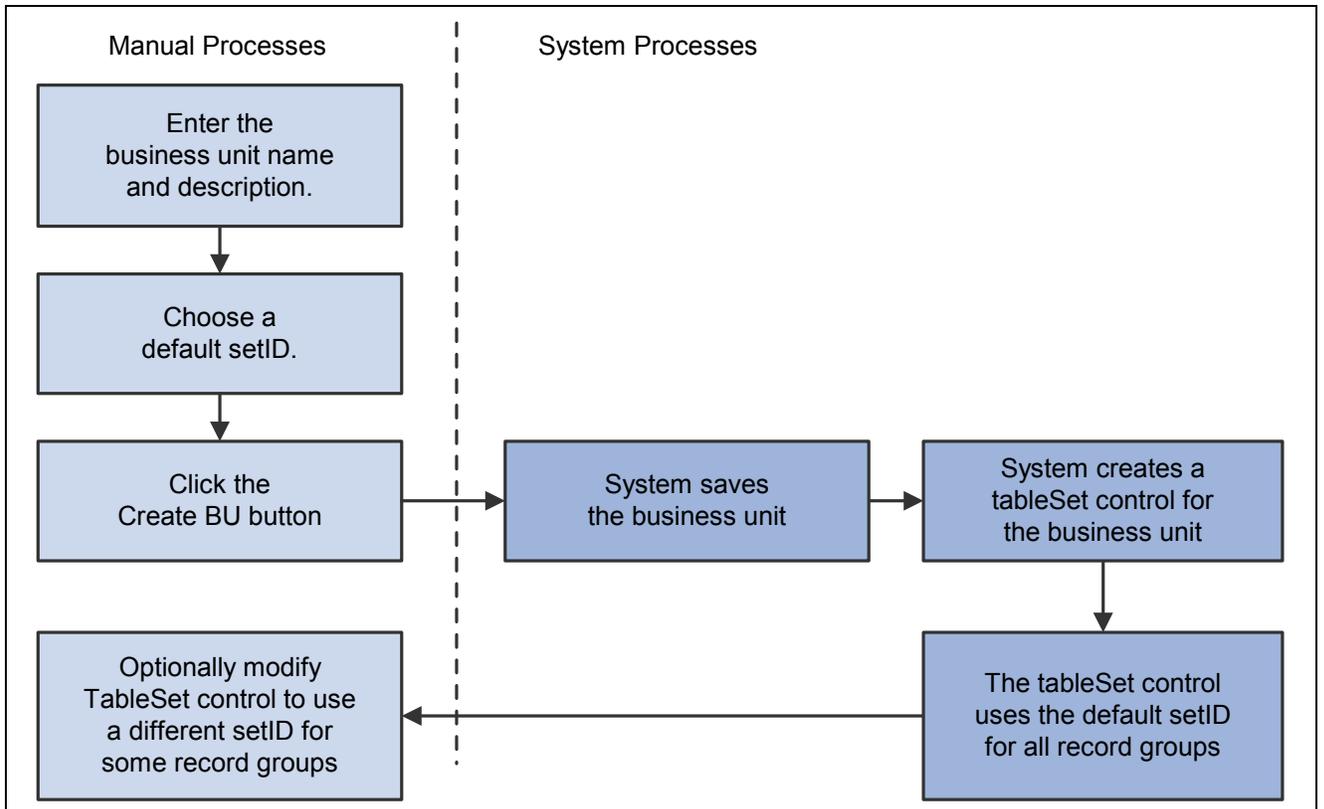
TableSet control setup process

To define a business unit's TableSet control:

1. Create the business unit on the appropriate application-specific page.

   The system creates a default setID corresponding to the business unit name.

   If the business unit uses only its default setID, you are finished; continue to the next step only if the business unit uses setIDs that are other than its defaults.

2. Use the TableSet Control page to create additional setIDs.

3. Use the Record Group page (in the TableSet Control component) to map setIDs to record groups.

If necessary, use the Record Group page (in the Record Group component) to review which records are in each record group.

In addition to setting up business units and setIDs, you must set up appropriate security.

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term *set control field.*

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Enterprise PeopleTools PeopleBook: Getting Started with PeopleTools

Pages Used to Define Business Units and TableSet Controls

Page Name	Object Name	Navigation	Usage
Call Center BU	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU	Create a call center business unit and its default setID.
FieldService Business Unit	BUS_UNIT_RF1	Set Up CRM, Business Unit Related, FieldService Definition, FieldService Business Unit	Create a field service business unit and its default setID.
Marketing Definition	RA_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Marketing Definition, Marketing Definition	Create a marketing business unit and its default setID.
Internal (order capture definition)	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Internal	Create an order capture business unit and its default setID.
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition, Quality Definition	Create a quality business unit and its default setID.
Sales Definition	RSF_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Sales Definition, Sales Definition	Create a sales business unit and its default setID.
Define Change Management	BUS_UNIT_TBL_RG	Set Up CRM, Business Unit Related, Change Management Definition, Define Change Management	Create a change management business unit and its default setID.
Online Marketing Definition	BUS_UNIT_TBL_RY	Set Up CRM, Business Unit Related, Online Marketing Definition, Online Marketing Definition	Create a change management business unit and its default setID.
TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSet IDs, TableSet Control	Create a setID.
Record Group	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, Record Group	Review and modify a business unit's TableSet control (which setID is used for which record group).
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Administration, Record Group, Record Group	Review the records that are included in a record group.

CHAPTER 3

Setting Up General Options

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) general options and discusses how to:

- Set up automatic numbering rules.
- Set up PeopleSoft Enterprise CRM application installation options.
- Set up regions.
- Set up locations.
- Set up salutation codes.
- Define alpha indexes.
- Set up payment terms.
- Set up data archiving.

Understanding PeopleSoft Enterprise CRM General Options

This section discusses:

- Automatic numbering.
- Installation options.
- Regions.

PeopleSoft Enterprise CRM general options are the basic control values that apply to multiple PeopleSoft Enterprise CRM applications.

Automatic Numbering

The system can automatically generate unique numeric identifiers for many PeopleSoft Enterprise CRM objects by tracking the last number used and increasing the number by one for each new object. Autonumbers come from several sources: autonumbering rules, last numbers, and PeopleTools global unique identifiers (PeopleTools GUIDs).

If you need to autonumber in increments that are greater than one, use the `GetNextNumberWithGapsCommit()` function.

Autonumbering Rules

When you set up autonumbering rules, specify number prefixes and set the length of the identifier. You can use different rules for different setIDs.

Depending on how you set up autonumbering, duplication of numbers between business units can occur. For example, suppose that you use PeopleSoft Computer/Telephony Integration (PeopleSoft CTI) and callers key in a number, such as a service order ID, that is generated through autonumbering rules; you must set up autonumbering to ensure that the number is unique across all business units.

To review which objects use autonumbering rules, review the number types that you can select on the Auto Numbering page.

SetIDs and Autonumbering

Certain objects that are not keyed by business unit or setID are hard-coded to use rules that are set up under the SHARE or NONE setIDs. In this case, if you set up an autonumbering rule for any of these objects under a regular setID (for example, CRM01), the system uses the rule of the setID that is hard-coded to this object when it assigns the next number to a new record. As a result, the autonumbering rule of the NONE setID, not CRM01, is used.

Last Numbers

Enter only the last number that the system uses to create new identifiers. For each object that uses this method, PeopleSoft delivers a row of data in the Last Number table (PS_RC_LAST_NBR_TBL). You can review the data and change the starting number, but that is the only necessary setup.

Numbers are not associated with setIDs, which means that the numbers are guaranteed unique across the system.

To review which objects use last numbers, review the data that appears on the Last Numbers page.

Last Number Types

PeopleSoft delivers PeopleSoft Enterprise CRM with a set of last number types and a predefined Last Number table which includes the last number types that are required for the core PeopleSoft Enterprise CRM applications. When you add PeopleSoft Enterprise CRM applications for specific vertical markets, you must add last number types for objects used by those applications to avoid system errors that result from the object having no entry in the Last Number table.

For example, the following error might occur:

While trying to create the Time Header record, an error has occurred. If the error continues to happen, contact your Systems Specialist. RC_CASE.BUSINESS_UNIT.SavePreChange (Record PeopleCode).

To resolve this error, add the last number type, TIME_SHEET_ID, for the SHARE setID (or the specific setID that you have defined).

PeopleTools GUIDs

GUIDs are used only where the number is not visible online; there is no setup associated with these objects. For instance, business object IDs use GUIDs.

Installation Options

Installation options include system settings for PeopleSoft Enterprise CRM products that you installed. The system options that you set determine:

• Which PeopleSoft Enterprise CRM products you are using.

- Defaults for system options and data, such as country, market, and exchange rate calculations.

  See Chapter 7, "Setting Up Currencies," Calculating Currency Exchange, page 134.

- The standard work week used to determine the start and end time of holidays and to determine worker availability for assignments.

  See Chapter 3, "Setting Up General Options," Setting Calendar Options, page 28.

- The character set that the system uses for languages whose symbols are not easily represented by a single-byte code.

  See Chapter 9, "Implementing Alternate Character," page 145.

- The business object that represents guest users or anonymous callers in the system.

  See Chapter 4, "Setting Up Security and User Preferences," Setting Up Guest Users, page 91.

- What data is available to Human Resources Help Desk.

  See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Understanding Enterprise Integration Technology.

- How different applications perform contractual pricing and billing.

  See Chapter 26, "Defining Pricing Information for Services and Support Offerings," Establishing Pricing Records, page 431.

Regions

You can associate regions with customer and worker addresses, provider groups (as part of the group assignment criteria), sales territories, product definitions, and (in PeopleSoft Phone Number Administration) with pools of telephone numbers.

See Chapter 3, "Setting Up General Options," Setting Up Regions, page 31.

Setting Up Automatic Numbering

To set up automatic numbering, use the Automatic Numbering (AUTO_NUM_PNL) component.

This section discusses how to set up autonumbering rules.

Pages Used to Set Up Automatic Numbering Rules

Page Name	Object Name	Navigation	Usage
Setup Auto Numbers	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Setup Auto Numbers	Define automatic numbering for objects that use numbering rules.
Last Number Setup	RC_LAST_NBR_TYPE	Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers, Last Number Setup	Specify last numbers for objects that use last numbers in autonumbering.

Setting Up Automatic Numbering Rules

Access the Setup Auto Numbers page.

Setup Auto Numbers page

Note. If you have PeopleSoft Integrated FieldService installed and you are setting up autonumbering for service order IDs (SO_ID), you must also set up autonumbering for timesheets, material IDs and manage expenses IDs or you will receive an error message when using the application.

SetID   Displays the setID that controls the numbering rules. A few objects are hard-coded to use either the SHARE or NONE setID.

                                   See Chapter 3, "Setting Up General Options," Automatic Numbering, page 19.

Number Type   Displays the type of object whose rules you are setting up or displaying.

Field Name   Displays the field where the number is stored—for most objects, this is the object identifier. The system enters the appropriate field name based on the number type.

Length   Displays the length of the field, so that you are sure that the numbers that you generate are not too large for the field.

Start Seq (start sequence)   Enter a prefix that is placed in front of the number. The prefix can contain up to three alphanumeric characters. A start sequence of three zeroes ("000") indicates that no prefix is used.

Note. PeopleSoft CTI requires that all user inputs are either all numbers or all letters, but not a mix. Certain autonumbered fields that PeopleSoft CTI users enter (for example, IDs for orders, service orders, and customers) normally can contain a mix of numbers and letters, but if you use PeopleSoft CTI, give these fields autonumbering definitions that use just one or the other.

Max Length (maximum length)   Enter the maximum length of the number. This cannot exceed the length of the field.

Last Number Issued   Enter the last number issued. Automatic numbering begins with the next number.

Default?   Select the autonumbering rule to use by default when the start sequence is not specified. If more than one row of autonumbering rules exists, you can activate only one as the default.

Specifying Last Numbers

Access the Last Number Setup page.

Last Number Setup page

Note. Not all rows that appear on the Last Number Setup page appear here.

Object Type   Displays the objects for which you can set up autonumbering. The installation process creates a row for each object whose numbering you manage on this page.

Record (Table) Name and **Field Name**   Enter the table and field name of the object.

Last Number   Enter the last identification number that is in use for this object. Automatic numbering begins with the next number.

The numbers from 0 to 20000 are reserved for delivered data.

	Click the Test icon to increase the last number by one and test the autonumbering functionality.
Add a New Last Number Type	Click this button to select a new last number type from a list of last number types. When you add a last number type, you must specify the Object Type, Record (Table) Name, and Field Name with which it is associated.

Setting Up PeopleSoft Enterprise CRM Application Installation Options

To set up PeopleSoft Enterprise CRM Application Installation Options, use the Installation Options (RB_INSTALLATION) and Manufacturer (MANUFACTURER) components.

This section discusses how to:

• Set up general options.

• Set calendar options.

• Set up alternate characters.

• Set up an anonymous business object.

• Set up billing and pricing options.

• Set up manufacturers.

Pages Used to Set Up PeopleSoft Enterprise CRM Application Installation Options

Page Name	Object Name	Navigation	Usage
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Set up the applications that you are using and enter other general options.
Calendar Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Set up the standard workday and workweek for the enterprise at the time of installation.
Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
Anonymous Object	RB_ANON_BUS_OBJECT	Set Up CRM, Install, Installation Options, Anonymous Object	Set up an anonymous business object.
Billing and Pricing Options	RB_INTEGRATION	Set Up CRM, Install, Installation Options, Billing and Pricing Options	Select options for contractual billing and pricing.
Manufacturers	MANUFACTURER	Set Up CRM, Common Definitions, Manufacturers, Manufacturers	Set up manufacturers for asset integration.

Setting Up General Options

Access the General Options page.

General Options | Calendar Options | Alt Character | Anonymous Object | ▶

PeopleSoft Products

☑ Mobile Account Planning   ☑ Order Capture
☑ Integrated FieldService   ☑ Order Capture - Self Service
☑ Mobile Field Service   ☑ Mobile Order Capture
☑ Support   ☑ CRM Portal Pack
☑ Support-Customer Self Service   ☑ CTI Integration
☑ HelpDesk   ☑ Multichannel Communication
☑ HelpDesk-Employee Self Service   ☑ Partner Commerce
☑ HelpDesk for Human Resources   ☑ Partner Marketing
☑ Sales   ☑ Partner Planning
☑ Mobile Sales   ☑ Partner Platform
☐ Sales Product Configurator   ☑ Partner Sales
☑ Oracle Configurator   ☑ Partner Service
☑ Advanced Configurator   ☑ Online Marketing
☑ Mobile Configurator   ☐ Incentive Management
☑ Strategic Account Planning   ☑ Policy and Claims Presentment
☑ Marketing   ☑ Phone Number Administration
☑ Telemarketing   ☑ SmartView
☑ Real-Time Advisor   ☑ Services Management
☑ Banking Transactions   ☑ Infosync Server
☑ Bill Presentment   ☑ Enterprise Sale for Blackberry
☑ Client Manager   ☑ Order Capture Dashboard
☑ Infosync Client   ☐ Third Party Optimization
☑ Offer Management   ☑ Sales Dashboard

General Options page (1 of 2)

General Options page (2 of 2)

PeopleSoft Products	Displays the names of the applications that are installed in the database.
	Note. Oracle Customer Data Hub and Oracle Data Librarian are not used at this time. These options will be available in future releases.
Country	Enter the country code for the installation.
Exchange Rate Type	Enter the exchange rate that you are using for this PeopleSoft installation.
Market	Select the market for which PeopleSoft Enterprise CRM is licensed. This is *Global,* unless you license one of the industry applications. In that case, use the market that is applicable to that industry.
Agreement Renewal Lead Time	Enter the number of days that you want the system to use to notify you when agreement need to be renewed.
Collector/Credit Analyst Req. (collector/credit analyst required)	Select this check box to make the Collector/Credit Analyst field a required field.
Geo Code Integration	This is used for Environmental Systems Research Institute (ESRI) integration.

	See *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "ESRI Integration".
NLP Framework (natural language processing framework)	Select if you are integrating with the Banter RME (Relationship Model Engine) server through Integration Broker to build an NLP framework.
	NLP enables CRM applications to automate certain business tasks by running concept-based content analysis on information it receives and providing appropriate suggestions that can be used to drive business processes.
360-Degree Search Context	Select this option to control the behavior of the 360-Degree View search page. When you select this option, business object information from the 360-Degree View search page remains in system memory. The system uses this information to bypass the search page and retrieve the same business object information the next time the user accesses the 360-degree view as long the current user session is active and the interaction for that business object is still open.
Use Only Evaluation Type	If you use the Person Competency EIP to synchronize data with PeopleSoft Human Resources Management (PeopleSoft HRMS), select the type of evaluation that is considered a valid competency profile.
	See *PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies.*
Allow Prospects	Select this option if you want to allow Sales users to enter prospects (potential customers and contacts that are not saved to the CDM) into the system.
	Prospect information is available only in the transaction for which it is created. When enabled, this functionality is also available in the Mobile Sales application.
	See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Understanding Sales Leads and Opportunities," Prospects.
Enable Duplicate Processing	Select this option to check for duplicate customer information when using Quick Create to create business objects.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

Setting Calendar Options

Access the Calendar Options page.

Note. You need to define work week information only if you want to create entries on worker calendars automatically when a service order is assigned.

Calendar Options page

Default Work Days   Select the check box for each standard workday.

Start Time and **End Time**   Enter the default start and end times for the workdays you selected.

Setting Up Alternate Characters

Access the Alt Character page.

Alt Character page

See Chapter 9, "Implementing Alternate Character," page 145.

Setting Up an Anonymous Business Object

Access the Anonymous Object page.
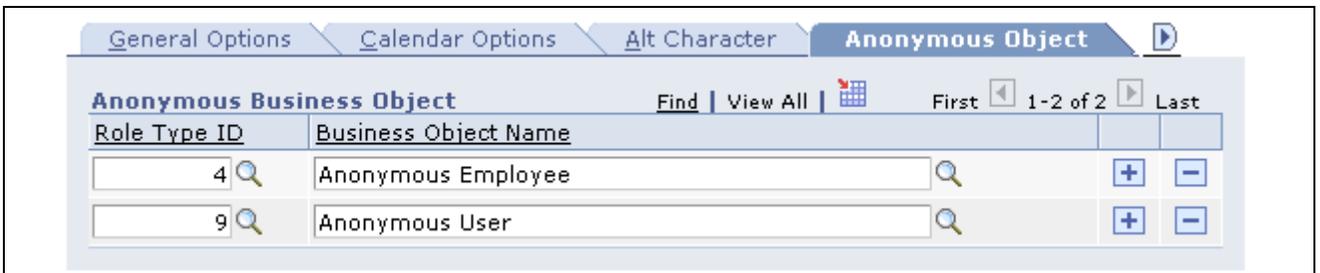
Anonymous Object page

See Chapter 4, "Setting Up Security and User Preferences," Setting Up Guest Users, page 91.

Setting Up Billing and Pricing Options

Access the Billing and Pricing Options page.

Billing and Pricing Options page

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Setting Up PeopleSoft Order Capture"

Setting Up Manufacturers

Access the Manufacturers page.

Manufacturers page

Enter a short and long description of the manufacturer in the corresponding fields. Use this page only if you are setting up asset integration with PeopleSoft Financials. The manufacturers that you set up here appear as selections for the Manufacturer field on the Installed Product, Installed Asset, and Product Mapping for Hardware Assets pages.

Note. Certain setIDs, like SHARE, contain manufacturer data that is brought over from PeopleSoft Financials. For these setIDs, you cannot enter values for new manufacturers. In these situations, all values for new manufacturers for the setID must be defined on the FMS system and synchronized to CRM from that source. Manufacturer values are shown in read-only format on the CRM database for these setIDs.

Setting Up Regions

To set up regions, use the Region (RB_REGION) component.

This section discusses how to set up regions.

Page Used to Set Up Regions

Page Name	Object Name	Navigation	Usage
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions for use with various PeopleSoft Enterprise CRM transactions.

Setting Up Regions

Access the Region page.

Region page

Category   Select to indicate how PeopleSoft Enterprise CRM references this region:

- *Geography:* Use this region in addresses, provider group and worker assignment criteria, and pricing definitions.

        • *Product Sales:* Use this region in product definitions to define where the product is sold.

        • *Territory Assignment:* Use this region when defining territories in PeopleSoft Enterprise CRM Sales.

        • *Number Management:* Use this region for number management (for example, pools of telephone numbers) in PeopleSoft Phone Number Administration.

Status   Select *Active* or *Inactive.*

Region Type   Select a type that describes the basis for regional divisions. General-purpose types are *Country, Phone, Postal, Region,* and *State. Region* is the most generic value, used when none of the other values apply.

                                  Types that are specific to the communications industry are *Service Area, Postal Wireline,* and *Postal Wireless.* A service area is the top-level region for number management; you typically use postal wireline and postal wireless for service area subregions.

Parent Region ID   Enter the region ID for the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent and child relationships.

Region Hierarchy   Displays the entire regional hierarchy, including the current region.

Setting Up Locations

To set up locations, use the Location (LOCATION_TBL) and Location Timezone (RB_LOC_TIMEZONE) components.

This section discusses how to set up locations.

Pages Used to Set Up Locations

Page Name	Object Name	Navigation	Usage
Location Definition	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location, Location Definition	Define a physical location such as corporate headquarters, a branch office, or a remote sales office.
Location Detail	LOCATION_TBL2	Set Up CRM, Common Definitions, Location, Location, Location Detail	Enter details for the selected location.
Location Timezones	RB_LOC_TIMEZONE	Set Up CRM, Common Definitions, Location, Location Timezones, Location Timezones	Associate locations with time zones.

Defining Locations

Access the Location Definition page.

Location Definition page

Status	Select the status of this record as of the associated effective date: *Active* or *Inactive.*
Country	Select the country for the location. The system adjusts the other address fields based on the address format that is defined for the selected country.
In City Limit	If you provide data to a third-party tax provider, selecting this check box identifies the location as one that is subject to applicable city taxes.

Entering Location Details

Access the Location Detail page.

Location Detail page

Attention	Enter the name of the person whose name should appear in the Attention field for correspondence for the location.
Location Detail	Enter descriptive text about the location.

Associating Locations with Time Zones

Access the Location Timezone page.

Location Timezones page

SetID	Enter the setID for the locations that you want to view.
Location Code	Enter a full or partial location code for the locations that you want to view.
Show Unassigned Rows Only	Select to view only locations without a time zone.

Setting Up Address Formats and Values

To set up address formats and values, use the Country (COUNTRY_TABLE) and State (STATE_DEFN) components.

This section discusses how to set up address information.

Pages Used to Set Up Addresses

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Set Up CRM, Common Definitions, Location, Country, Country Description	Update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up CRM, Common Definitions, Location, Country, Address Format	Specify formats for addresses so that they conform to the customary address format and conventions of the specified country.
State	STATE_DEFN	Set Up CRM, Common Definitions, Location, State	Add or review a state or province code. PeopleSoft delivers applications with fully populated state code tables (PS_STATE_TBL) and updates these tables as boundaries and designations change.

Updating Country Definitions

Access the Country Description page.

Country Description page

The PeopleSoft system contains fully populated country code tables (PS_COUNTRY_TBL). PeopleSoft updates these tables as national boundaries and designations change.

2-Char Country Code   Enter the value-added tax registration ID.
(two-character country code)

EU Member State
(European Union member
state)

Select this check box to use euro conventions to translate currencies for
this country.

Specifying Address Formats

Access the Address Format page.

Address Format page

Available

Select to activate the corresponding address field and its label for inclusion as
part of the standard address format for this country. When they are entering
addresses, users enter a country code, and the system updates the page to
display the fields that are appropriate for the specified country.

Note. To hide the field for a given country, you must *both* clear the Available
field *and* blank out the Label field.

Label

Enter field labels to configure the address format so that it conforms to
the country's address requirements. For example, if you enter *Province* or
Department in the state label field, this value appears as the label of the field
on the address page instead of *State.*

Postal Search

Select this check box to activate postal searching functionality for Dutch,
Japanese, or UK addresses. For the UK, when you select this check box, the
system makes the fields that are in the PeopleSoft GB Systems Information
group box available for entry.

GB (Great Britain) System Information

This group box is used for UK addresses. It displays only if you have the Information Management Toolkit installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

National Registry Directory   Enter the location of the data files containing the postcode information.

Configuration File Prefix   Enter the location of the PeopleSoft-supplied configuration file (PS_GBSYS.INI).

Adding State or Province Codes

Access the State page.

State page

The PeopleSoft system contains fully populated state code tables, complete with descriptions.

Numeric Code   Enter a code for statistical and reporting purposes.

Important! You must enter a numeric code for states to display in the lookup for the License Issued By field in the Worker, Consumer, or Contact profile information.

Setting Up Salutation Codes

To set up salutation codes, use the Salutation Table (SALUTATION_TABLE) component.

This section discusses how to set up salutation codes that are used in correspondence.

Page Used to Set Up Salutation Codes

Page Name	Object Name	Navigation	Usage
Salutation Table	SALUTATION_TABLE	Set Up CRM, Common Definitions, Customer, Salutation Table, Salutation Code	Set up salutations for correspondence with customers.

Setting Up Salutation Codes

Access the Salutation Code page.

Salutation Code page

Enter the code and descriptions for the salutation that you want to use in correspondence and with customers.

Defining Alpha Indexes

This section provides an overview and describes how to define alpha (alphabetic) indexes.

Understanding Alpha Indexes

Alpha indexes are primarily used by the Sales application. An alpha index enables users to quickly locate all customers whose names begin with a certain letter or sequence of letters, similar to using a rolodex. The alpha index appears on account management and contact management pages and consists of the letters of the alphabet, by default.

You can modify the default index and define different alpha indexes for each installed language. Additionally, you can assign different alpha indexes for each user.

See Also

Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 81

Page Used to Define Alpha Indexes

Page Name	Object Name	Navigation	Usage
Alpha Index Definition	RD_ALPHA_IDX_DEFN	Set Up CRM, Common Definitions, Customer, Alpha Index Definition, Alpha Index Definition	Define alphabetic indexes that are used to filter a user's account list and contact list.

Defining Alpha Indexes

Access the Alpha Index Definition page.
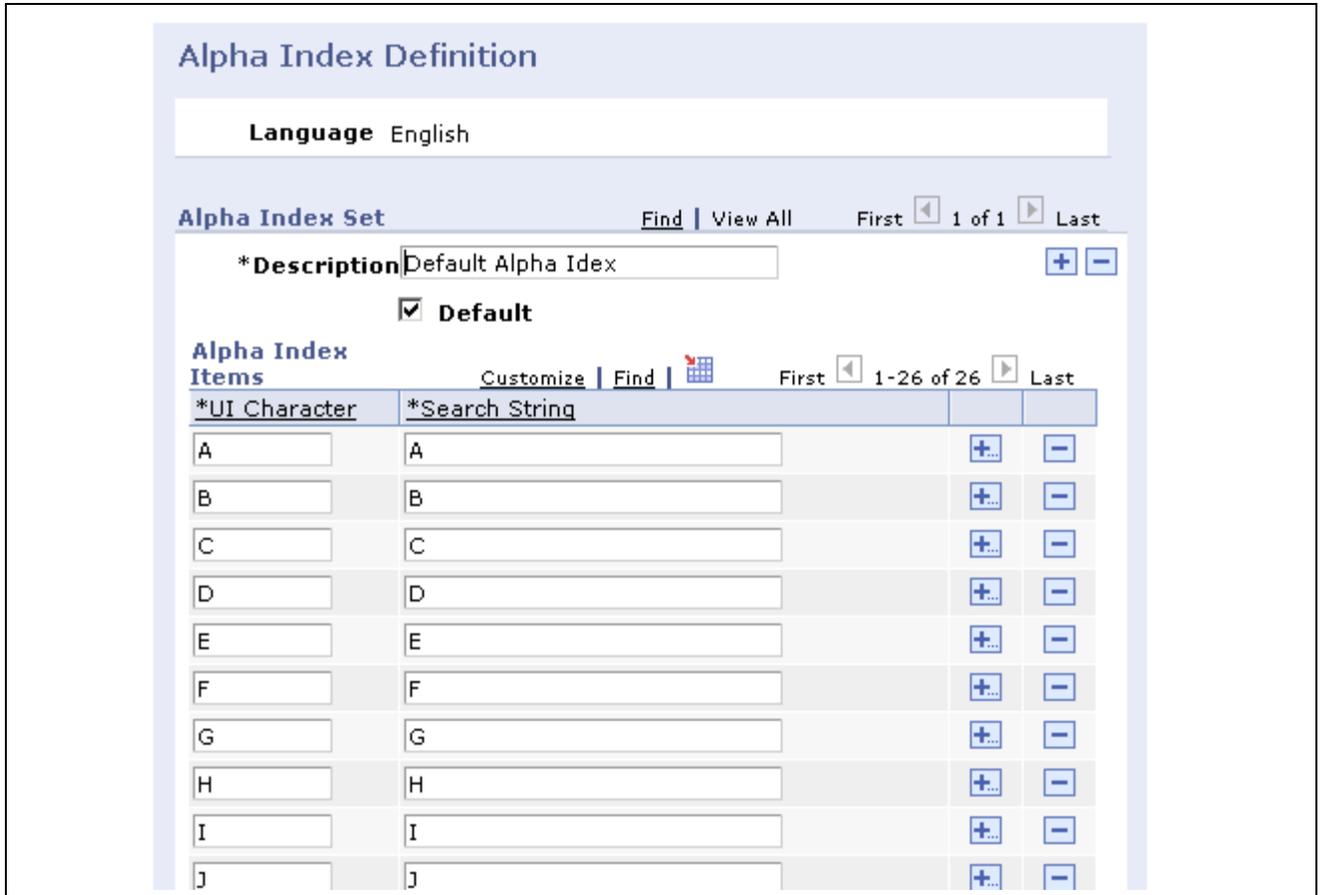
Alpha Index Definition page

UI Character	Enter the characters that identify this index on the user interface.
	For example, to define an index that encompasses the letters A through C, enter *A-C.*
Search String	Enter the search characters, separated by commas.
	For example, to search for names beginning with the letters A, B, or C, enter *A, B, C.*

Setting Up Payment Terms

To set up payment terms, use the Payment Terms (RB_PAY_TERMS) component.

This section describes how to set up payment terms.

Pages Used to Set Up Payment Terms

Page Name	Object Name	Navigation	Usage
Payment Terms	RB_PAY_TERMS	Set Up CRM, Common Definitions, Customer, Payment Terms, Payment Terms	Define codes for payment terms and enter descriptive information and effective dates.

Setting Up Payment Terms

Access the Payment Terms page.

Payment Terms page

Add the setID and payment term ID when you are adding a new payment term. Then, enter an effective date, status, and long and short descriptions.

Defining Units of Measure

To define units of measure, use the Units of Measure (UNITS_OF_MEASURE) component.

This section discusses how to define units of measure.

Pages Used to Set Up Units of Measure

Page Name	Object Name	Navigation	Usage
Unit of Measure	UNITS_OF_MEASURE	Set Up CRM, Common Definitions, Unit Of Measure, Unit of Measure	Define units of measure.

Setting Up Units of Measure

Access the Units of Measure page.
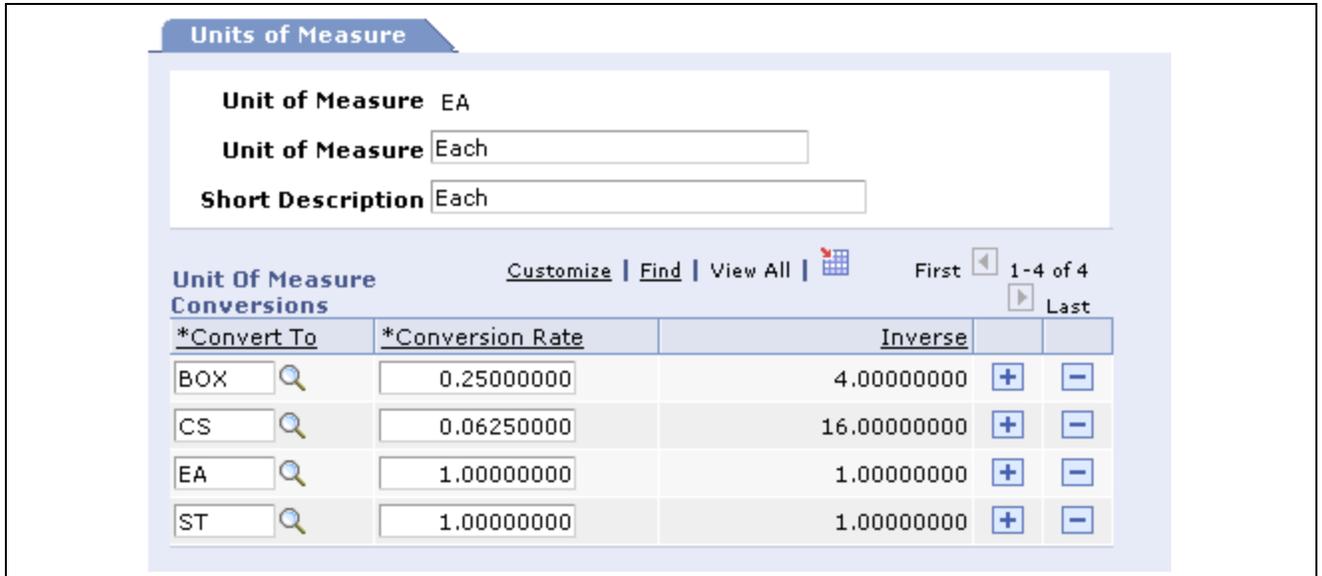
Units of Measure page

Conversion Rate	Enter a conversion rate to use as the default conversion rate between the unit of measure shown at the top of the page and the unit of measure listed in the Convert To field. The system automatically calculates the inverse conversion rate.

See Also

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

Setting Up Data Archiving

Data archiving enables you to improve system performance by using online storage for only those transactions that users are likely to access. Other transactions are archived.

Archiving is performed in the PeopleSoft Data Archive Manager using archive templates that are defined for PeopleSoft Enterprise CRM tables. This is a list of the archive templates that are defined in PeopleSoft Enterprise CRM:

Object	Template
Interactions	RI_INTER
Leads	RSF_LEAD
Orders	RO_HDR1
Quotes	RO_HDR1
Marketing Lists	RA_LIST
Chat Logs	RB_CHAT

Object	Template
Call Center Worklist Entries	WL_CASE
Case	RC_CASE
Business Projects	RC_BP
Service Order	RF_SO_HR

See *Enterprise PeopleTools PeopleBook: Data Management*

CHAPTER 4

Setting Up Security and User Preferences

This chapter provides an overview of PeopleSoft Enterprise CRM security and discusses how to:

• Set system-wide security options.

• Implement self-service security.

• Define PeopleSoft Enterprise CRM application security.

Understanding PeopleSoft Enterprise CRM Security

This section discusses:

• Security building blocks.

• Security terminology.

• PeopleTools security.

• Application security.

• Distributed security.

Security Building Blocks

This diagram provides an illustration of the different layers of security that are delivered in the PeopleTools and Customer Relationship Management security infrastructure. This chapter will cover each of these security building blocks to assist you in implementing the security needed for your enterprise.
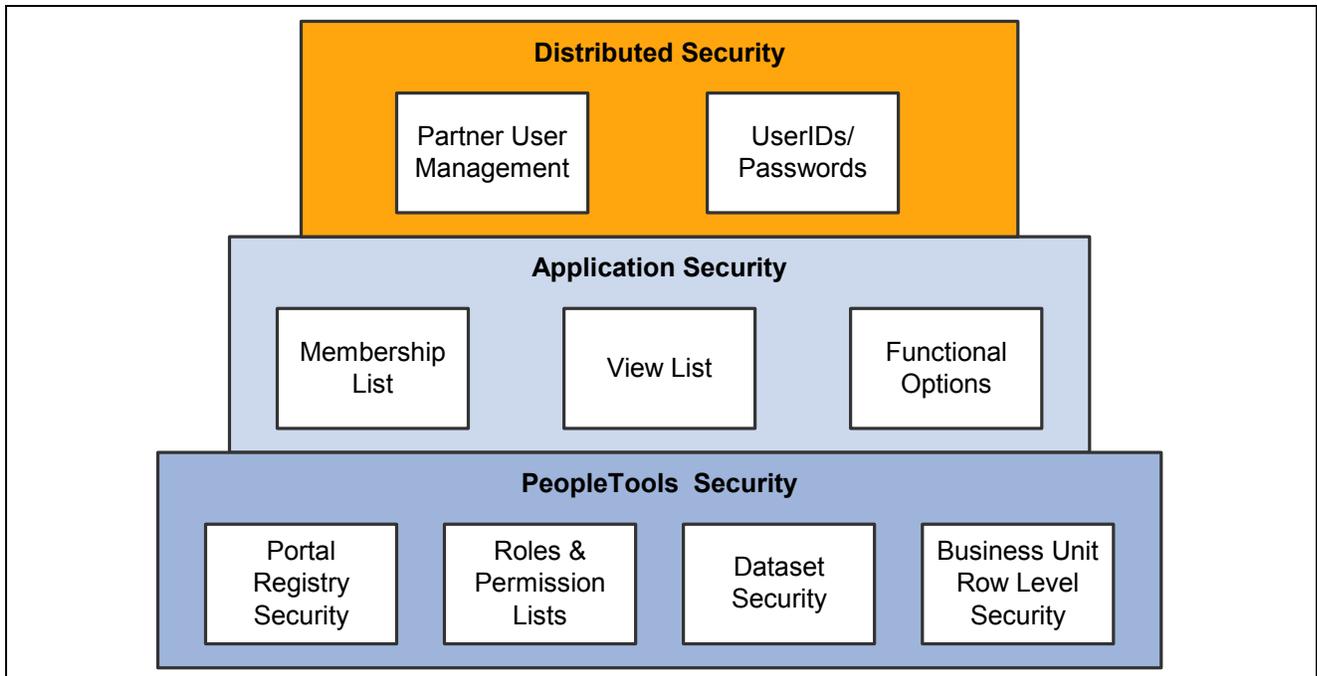
Security building blocks

PeopleTools security controls row-level access to transactions. For example, you would use dataset security to enable a sales representative to see leads as the lead owner, or to enable a sales manager to view leads as manager, and so on.

Application security provides three key elements of CRM security: memberships lists, view lists, and functional options. Membership lists can define the characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. View lists can define the characteristics of one or a group of objects (for example, customers) that a member group has view privileges to. Functional options restrict the user to a set of allowable actions within a secured transaction.

Distributed Security or Delegated administration enables you to set up administrators that are external to your enterprise so they can give other users system access, within the confines of the permissions that you allow the administrator to grant.

Security Terminology

Before you can fully enable security, you must understand the security terms and functions at each level of the system:

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system	Operating system	Controls access to the database.

Security Type	Where Implemented	Function
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups that are used in application development.
Query	PeopleTools	Defines the set of table rows that a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Restricts access to a subset of data rows within tables to which the user has authority.
Permission list level	PeopleSoft applications	Enables PeopleSoft application security.

PeopleTools Security

Use PeopleTools security to define roles and permissions. PeopleSoft delivers a set of roles out of the box that you can use to set up role-based access to PeopleSoft transactions. PeopleSoft provides a recommended set of roles and permissions with each of the products delivered. You can add or modify new or existing roles and permissions to fit your business requirements.

This section discusses

- Portal registry.

- Roles and permission lists.

- Dataset security.

- Business unit row level security options.

- Preferred markets and security.

Portal Registry

The portal registry is a set of dedicated PeopleSoft database tables that store every content reference, typically a URL, available through the portal. A portal registry has a tree-like structure in which content references are organized, classified, and registered. A portal registry contains folders and content references. Folders group and organize content references into a multilevel hierarchy. Except for the root folder, each folder has a parent folder, and each folder can contain content references as well as other folders. Content references are objects that have been registered in the portal registry.

There are several ways to access and maintain the portal registry:

- Use the registration wizard to register content references, assign security, and update.

- Use the Menu Import feature to upgrade custom menu group definitions.

- Use portal administration pages to add, change, or delete folders and content references from a portal registry.

- Use the portal registry application programming interface (API) for programmatic access to the registry.

- Use the security synchronization process to update the portal registry security based on the menu and script security.

    See *Enterprise PeopleTools PeopleBook: Internet Technology*

Roles and Permission Lists

Permission lists are the building blocks of user security authorizations. You typically create permission lists before you create user profiles and roles. When defining permission lists, however, consider the roles and user profiles that you will use them with. Recall that roles are intermediary objects between permission lists and users. You use roles to assign permissions to users dynamically. Permission lists may contain any number of permissions, such as sign-in times, page permissions, and component interface permissions. Permission lists are more flexible and scalable when they contain fewer permissions.

Dataset Security

Dataset security controls row-level access to transactions. Dataset security is achieved by associating the definition of a dataset to the search definition for transactions that have multiple dataset rules. PeopleSoft dataset security framework may be used to build dataset rules and assign the dataset rules to PeopleTools roles.

PeopleSoft delivers a set of dataset security rules that may be used to secure transaction rows. PeopleSoft Enterprise CRM uses dataset security for data searches to restrict transaction rows.

It is also used in these applications and functions:

- PeopleSoft Sales and Mobile Sales (leads and opportunities).

- PeopleSoft Order Capture and Mobile Order Capture (quotes and orders).

- PeopleSoft Mobile Field Service.

- Calendar and Task Management.

- PeopleSoft Wealth Management.

- PeopleSoft Marketing (audience and marketing programs).

- PeopleSoft Partner Relationship Manager.

Business Unit Row-Level Security Options

You can implement security to prevent individual users or roles from accessing specific rows of data that are controlled by key fields. Likewise, you can restrict users so that they can access only a specific subset of rows. For example, you might set the user ID security for a call center agent in Paris so that the agent can access only the data that is for a particular European business unit. If you have a team of call center agents in Paris, you could add them all to a role and then use role security to give them all the same access to the system.

A user can belong to multiple roles and use the menu items that are assigned to all of those roles.

Note. You cannot define row-level security attributes by combining roles. In PeopleTools, you designate row-level security for a user by selecting a row-level security role. The row-level security attributes for the role that you select become the security attributes for the user.

This table describes the consequences of row-level security when you use different combinations of system security options and roles:

System Security	Role of User ID	Row-Level Security
No security	The user ID is not linked to a role.	Not applicable. All users can access every object because you have not implemented security.
User-level security	The user ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. You can link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then the user has access to menu items but not to any application pages with key fields that are enabled for row-level security.
Permission list-level security	All users in a permission list have the same level of security.	Users are limited to the key fields that are specified by the permission list that is assigned to their user IDs.

You must define the users or roles that have access to specific business units and setIDs. For example, you might give a particular role access to only one business unit. When a user in the role enters prompts for business units (for example, when entering data that has business unit as the primary key), the available selections include only the business units for which the user has been granted authority. The user's available data has been filtered through one or more levels of security.

The number of users that are assigned the same level of security is a key factor in determining whether you base security on user IDs or roles. If a large number of users have identical access requirements, consider using roles. By assigning the users to a single role, you can make subsequent changes to access requirements once rather than many times.

Preferred Markets and Security

The preferred market that is associated with a user ID controls the data and functions that a user can access. Preferred markets are of two types: industry and geographic.

If a user's preferred market is geographic, the user can only access functionality and data that are valid for business units in the geographic region or country. For example, a country might require certain information about imports that users in another country would not need to enter.

If the user's preferred market is by industry, the user is granted access to only the functionality and data that are implemented for those industries. For example, when financial market users define companies, they can specify financial account and contract data.

See Also

Enterprise PeopleTools PeopleBook: Internet Technology, "Understanding Portal Technology"

Enterprise PeopleTools PeopleBook: Security Administration

Application Security

This section discusses:

- Enterprise administration.
- CRM application security terminology.
- Application security framework.
- Security objects.
- Dynamic and static membership lists.
- Dynamic and static view lists.
- Implicit view lists.
- Functional options.
- Functional option groups.
- Functional options conflict resolution.
- Enabling functional options.
- Business object search system processing.
- Financial services industry security.
- Catalog security.
- How security is processed at runtime.

Enterprise Administration

Application Security consists of three main pieces: membership lists, view lists and functional options. Using PeopleSoft Enterprise CRM application security, enterprise administrators have the ability to:

- Define the community of participants for which security is restricted (membership list)
- Define a group or specific list of objects (for example customers) that a partner is allowed to view and transact with (view list).
- Define a set of business processes or actions that a participant in the membership group can perform (for example, what a partner can do).

CRM Application Security Terminology

This table lists terms related to security:

Term	Definition	Example
Security Object	An object or entity that is being secured.	Partners should be allowed to view only customers that they are allowed to view. Partner is by definition a security object. Customer is also a security object.
Membership List	Characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. The list ultimately contains a list of members.	A group of partners or partner users.

Term	Definition	Example
View List	Characteristics of the viewing object (for example, customers, or accounts) that are secured from the membership list. The list ultimately contains a list of objects.	A group of customers.
Functional Options	A unique code that defines what someone can do within a transaction.	Determines whether the partner can maintain orders, add customer addresses, or edit revenue.
Functional Option Group	A grouping of functional options.	Determines whether the partner can maintain orders, add customers, or view customer addresses.
Security Profile	A template that defines the view lists and functional options. A security profile is given to one or multiple membership list domains.	California customers or western manufacturing customers with the ability to maintain orders and add customer addresses.
Transaction	A primary business activity like creating orders, leads, opportunities, cases, service orders, and campaigns.	Order creation.
Security List Record	A table that stores the results of the security domain queries or the static list.	Partner list.

PeopleSoft Enterprise CRM Application Security Framework

PeopleSoft Enterprise CRM application security framework is a characteristic-based security framework that enables PeopleSoft customers to secure data and functions within a transaction.

For example, suppose you have a group of partner insurance agents that need access to a specific group of customers and you want this group of partners to only generate quotes, submit policy applications, and add customer addresses. Using the pages within the PeopleSoft Application Security component, you can create the security objects, lists, and profiles that you need to secure your PeopleSoft Enterprise CRM applications to accommodate this situation.

Use PeopleSoft application security to abstract partners and customers as security objects. The characteristics that define the group of partners or customers are called lists.

You can predefine the objects and lists as either membership or view to differentiate viewers (partners who are members with a security profile that have access to specific objects and data) from the target transactions or data objects (which can be customers that are secured within the partner's view privileges).

Note. Application security is used only to secure objects (person, partner, customer, financial accounts, product catalog, hold codes, performance metrics, and so on) and not transactions (orders, leads, opportunities, cases, and so on). Objects in this context mean setup data or data that is used to create a transaction.

PeopleSoft CRM does not deliver an application security feature for securing customers from user roles. To make this work, you would have to customize the security criteria in the Business Object Search adapter definition and then make some minor coding adjustments.

Application security involves setting up and defining:

• Membership lists

Membership lists define the characteristics of one or a group of users (for example, partner users) to whom system and data access and functional permissions and privileges are granted. Users in a security membership list definition are associated with a security profile.

• View lists

View lists define the characteristics of the viewing object (for example, customers, accounts, product catalogs) that are secured from the membership list.

• Functional options

Functional options define the functions (for example, order submission) that can be carried out by members of a membership list.

• Security profiles

Security profiles define the combination of view lists and functional options that make up a specific profile of view and function access. Security profiles are given to members belonging to a membership list.

This illustration represents a high-level view of a security profile using PeopleSoft Enterprise CRM Application Security.
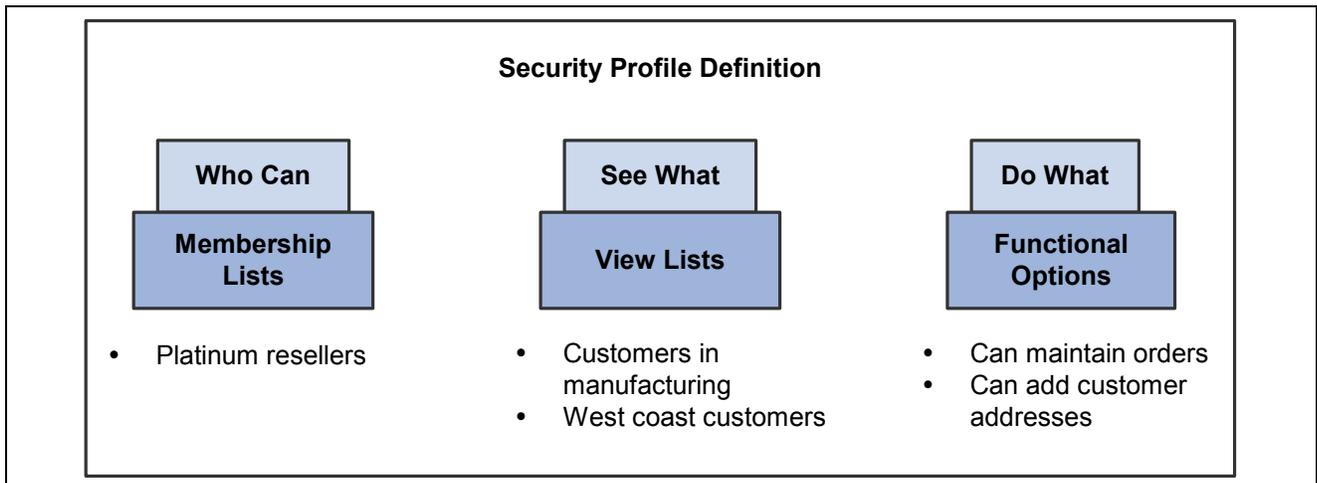
Security profile definition

Security Objects

PeopleSoft delivers a number of security objects that you can use to implement security. You should not, however, change them in any way. Any changes that you make to the security objects delivered by PeopleSoft impact the security profiles and the security list tables. PeopleSoft recommends that you limit the number of security objects that you create and are careful how you use them.

PeopleSoft delivers these membership type security objects out of the box:

Security Membership Object	Security Object Type	Industry
Customer	Membership	Order Capture
Financial Account Holder	Membership	Financial services and insurance
Partner	Membership	All
Partner Contact	Membership	Order Capture

Security Membership Object	Security Object Type	Industry
Person	Membership	All
Role	Membership	All

Dynamic and Static Membership Lists

A dynamic membership list is a saved query of characteristics that result in a list of members for a membership list object. The queries are saved using the dynamic criteria definition that is linked to the membership list object.

If the domain type is dynamic, you can edit the membership criteria using the appropriate dynamic criteria definition. You can also view the results of the membership list.

You may associate the membership list to any security profile currently available in the system. Once you associated the membership list with a security profile, that security profile appears in the security profile list for the membership list. When needed, you can remove the association of the membership list to the security profile.

Static membership lists contain a specific list of members that you may associate with any security profile currently available in the system.

Dynamic and Static View Lists

A dynamic view list is a saved query of characteristics that results in a viewable list of objects. You set up a view list object similar to the way you set up a membership list object. After you establish a view list, you may grant one or more view list objects (dynamic or static) to a security profile.

Note. Not all objects can be used as view list objects.

View List Security Objects that are delivered as system data:

View List Security Object	Security Object Type	Application
Catalog	View List	Order capture
Customer	View List	All
Financial Account	View List	Financial services and insurance
Hold Code	View List	Order capture
Performance Metric	View List	Marketing

Implicit View Lists

A dynamically defined view list can contain a bind variable or a criteria that is not resolved at the time of creation of the query but is resolved at runtime This is called an *implicit* view list.

A business scenario that is supported by *implicit* views lists would enable partners to view customers with whom they have previously done business with, where orders have been submitted with the partner identified.

For example, ABC Insurance (ABC1), during the creation of a home insurance policy, wants to use quick create to enter a new customer called John Smith (JS1). From this point onwards ABC Insurance would want to have access to John Smith's information.

If ABC Insurance (ABC1) creates an auto insurance policy, they would want access to John Smith (JS1) in the lookup table. The presence of both the partner (ABC Insurance) and the customer (John Smith) on the same transaction enables future partner access to that customer.

To create an implicit view list that would give ABC Insurance access to John Smith's account information, you would create a dynamic view list by selecting the *bind* search criteria for the Partner on Order field and then selecting Partner.

When you associate an implicit view list to a security profile and run the list refresh process, the system creates a new security profile for each member of the membership list that is associated to that security profile.

To set up an *implicit* view list, you must use the Configurable Search Setup - Search Fields page to select the *bind* variable for the security components and fields that you want to use on the Add View List or Add Membership List pages.

You can modify the Customer Search (RSEC_CUSTOMER_SRCH) component to use bind variables and create *implicit* view lists.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages".

Functional Options

Functional options are defined independently of security objects and domains. Functional options let you determine what a user you can do within an application. For example, you can create functional options that enable users to submit orders or add new customers. To group view lists and functional options, you define a security profile. The security profile is then granted or associated to one or multiple membership lists.

Functional Option Groups

Functional option group is a grouping of functional options, which you can be associated with a security profile. Using functional option groups can make maintaining security profiles easier and more efficient. Enterprise administrators that must make wholesale changes to security profiles can simply change the functional option group associated with the security profiles that must be changed or updated.

Example:

In the world of financial services you have consumer account holders. All consumers by default get a functional option group that enables them to withdraw money up to 200 USD from an ATM, transfer balances and so on. At the same time there is also a special consumer called Don Smith whose account number is 123456. Account 123456 is in a view list that is associated to Don's security profile. On this account you can create a specific functional option called Withdraw Money and let him withdraw money up to 300 USD. The general functional option group gives him default access to a group of functional options. But the specific functional option can be applied on his account by attaching a view list to his security profile. Based on the conflict resolution that is set up to override the first optional group, he can withdraw 300 USD from the ATM.

Functional Option Codes

Functional options enable the enterprise administrator to define the functions that users can access within a transaction. Functional options codes are evaluated at run time by the transaction that is evaluating the functional option.

PeopleSoft delivers these functional options codes out of the box when you install and implement PeopleSoft Enterprise CRM:

Functional Option Code	Description	Application/Function
CORE_RSF_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RSF_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RSF_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RSF_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RSF_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales rep by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RSF_SEARCH_PRODUCT_GROUP	Allows the end user to search for product group on leads and opportunities.	Sales
CORE_RSF_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RSF_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing
RC_SLA_DETACH	Allows user to clear a service level agreement.	Call Center
RSP_ADM_ACCT_TEAM	Administer account team functional option.	Strategic Account Planning

Functional Option Code	Description	Application/Function
RTM_EDIT_TASK	Edit task functional option.	Task Management
QC	Provides access to Quick Create.	Business Object Search
AFT	Automatic fund transfer.	Financial Services and Insurance
All	All.	Financial Services and Insurance
APPL	Complete applications for new contract.	Financial Services and Insurance
BIPY	Pay bills.	Financial Services and Insurance
CLM	Make a claim.	Financial Services and Insurance
CLOS	Close account.	Financial Services and Insurance
CMPL	File a complaint.	Financial Services and Insurance
CPOL	Change policy.	Financial Services and Insurance
FEER	Reverse transaction fee.	Financial Services and Insurance
INQ	Inquire about new contracts.	Financial Services and Insurance
IWIR	Initiate wires.	Financial Services and Insurance
MDAC	Modify financial account.	Financial Services and Insurance
MDEP	Make deposits.	Financial Services and Insurance
MPAY	Make payments.	Financial Services and Insurance
MWTH	Make withdrawals.	Financial Services and Insurance
NEGO	Negotiate terms of new contracts.	Financial Services and Insurance
ORCC	Order cashier's checks.	Financial Services and Insurance
ORDC	Order check copy.	Financial Services and Insurance
ORDD	Order document.	Financial Services and Insurance
ORFC	Order foreign currency.	Financial Services and Insurance
ORTC	Order traveler's checks.	Financial Services and Insurance
PROF	Change profile information.	Financial Services and Insurance
RECH	Reorder check book.	Financial Services and Insurance
REQI	Request information.	Financial Services and Insurance

Functional Option Code	Description	Application/Function
RWIR	Release wires.	Financial Services and Insurance
SCHK	Sign checks.	Financial Services and Insurance
SCON	Sign or approve new contracts.	Financial Services and Insurance
SECX	Complete security transactions.	Financial Services and Insurance
STOP	Complete stop payment requests.	Financial Services and Insurance
TMON	Transfer money.	Financial Services and Insurance
TSEC	Transfer securities in and out of accounts.	Financial Services and Insurance

Functional Options Conflict Resolution

Conflicts can happen due to the granting of the same functional options within a single security profile or multiple security profiles. To resolve conflicts the system uses these rules:

• If one functional option group grants an option and another revokes it, the revoke takes precedence. If the options are not in the same scenario, the option is granted. Revoke is for the functional option itself. (for example, do you have authorization for transfer money). If one functional option group says yes and another no, conflicts are resolved based on how the revoke options are set up.

• For amounts there is a conflict resolution called max amount wins. This means that if one functional option group gives a user access to 2000 USD and another functional option group give a user access to 3000 USD, and the max amount win option is selected, the user gets access to 3000 USD.

Here are two scenarios and the resolution mechanisms that are used to resolve the conflicts originating in the functional options:

1. Single Security Profile Functional Option Conflict Resolution:

   • Bob is a financial account holder with the account number of 2001.

   • Bob is associated with a single security profile (PROFILE_1).

   • The security profile is associated with a functional option that allows him to transfer money up to 300 USD.

   • Bob's account (2001) allows him transfer money up to 1000 USD.

   • The conflict resolution option on the Transfer Money functional option is set for maximum amount always to win.

   • *Resolution:* Bob can transfer up to 1000 USD.

2. Multiple Security Profile Functional Option Conflict Resolution:

   • ABC Warehouse is a partner to the enterprise.

   • ABC Warehouse is explicitly associated to a security profile (PROFILE_2) either through a dynamic membership list domain or a static membership list domain.

   • There is also a generic security membership list for all partners (PROFILE_1), which means it includes the Partner ABC Warehouse.

   • There are no functional options attached to the view list for both security profiles.

- For PROFILE_1, the administrator has specified functional options so that users can submit orders for amounts up to 5,000 USD.

  The ability to add addresses has been revoked.

- For PROFILE_2, the administrator has specified functional options so that users can submit orders for amounts up to 10,000 USD.

  The ability to add addresses has been granted.

- The conflict resolution option on the Order Submit functional option is set for the maximum amount always to win.

  The Add Address functional option is set so that the revoke option does not win.

- *Resolution:* The ABC Warehouse Partner can submit orders up to 10,000 USD and add addresses.

Enabling Functional Options

The display template framework allows you to configure functional option security for your pages. By referencing the functional option on a button or field within the display template, the functional option security is enabled.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Business Object Search System Processing

The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page. The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.

The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.

For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results set for the role. The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions.

Financial Services Industry Security

Access to plans and templates is secured by dataset rules. Once a plan or template is activated, no further changes can be made in the active status. Edit control security limits edit privileges to designated individuals who can change the status from active to draft status and make modifications.

To ensure consistency between account plans, account managers define account planning templates containing a default set of objectives and goals. They can attach a list of template editors who have security access to make changes and activate a template. Once a template has been moved from draft to active, and its date range is active, account managers can begin creating account plans from a template. Tasks can be attached to an account plan. These tasks appear when you view the tasks for the associated company.

A plan has two types of application security in addition to the PeopleTools security using the permission list. The row level application security is implemented by using dataset rules. Plan edit control security ensures that the user has been granted appropriate access before any status changes can be made to the plan.

With PeopleTools role security, when a user requests access to a page, the system checks the role of the user, and then checks the permission list belonging to the role to decide if the user can access the page. Certain component items can also be disabled by using the navigation security feature. Throughout the application, certain security measures target two roles: Administrator and Agent. If you define your own PeopleTools roles, you must map the roles with either the Administrator or Agent role to get the security features for the new roles.

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, "Configuring Application Security".

Catalog Security

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

For Order Capture there is a functional option code called SEARCH_ALL_PRODUCTS. When searching for products in Order Capture, this functional option will give users the ability to search for any products that are defined in the system, instead of limiting the search to the products that are defined in a catalog. You must group this option into a functional option group. You would then associate it to a membership list in the security profile.

Security Memberships allow you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a Membership List called All Persons that includes all of the people that have a person record in the system. This Membership List is then associated with a catalog.

This means that all of the people on this list can view this catalog. If a catalog called the Premier Catalog was for Premier Customers, a company can create a Membership List that contains all of their Premier Customers and the Premier Catalog would provide special pricing and recommendations for this group of users.

Note. PeopleSoft CRM does not support role-based catalogs, nor do we support role-based access to customers. The system can handle this type of functionality but you will need to customize your CRM application. The only area where you can use a role-based membership list, without customizing your application, is to control the Order Capture hold view list. The other area where you can use the role membership list, without customizing your application, is to control display logic in conjunction with a display template.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Creating Catalogs," Defining Catalog Content and Permissions.

How Security Information is Processed at Runtime

PeopleSoft Enterprise CRM application security uses several Application Engines and APIs (application programming interfaces) at runtime to help ensure that the customers and partners to whom you have granted security have access to the correct information and customers.

Here are the elements of runtime security that are activated when a partner, user, or customer attempts to access the PeopleSoft Enterprise CRM applications that you have secured.

• Application Engines

  - RSEC_DAEMON

    Polls for application updates (for example, when a customer is added or updated) and triggers the RSEC_BUILDER

- RSEC_BUILDER

  Handles the writing of secure objects to list tables.

- Runtime API

  - Determines security memberships and view lists.

  - Generate SQL filters for calling applications

  - Determines functional options, and functional option resolution.

- Definitional API

  Provides application programming interface to add and update security framework metadata.

PeopleCode Application Classes and SQL views provide the API to the security framework. This API is provided for impacted applications to access and update the application security framework. The API is used at runtime to evaluate membership and view privilege result sets, but there are some access methods that are provided to update the framework keys, membership, and view privilege tables directly. The API encapsulates all functionality and structure related to the security framework, so that calling applications do not need to understand the inner workings of the framework.

These access methods are an overview of how each of the impacted applications requirements are satisfied through the API.

- API Based Direct Data Access

  This access method is provided for instances where the membership tables contain all of the relevant data for the calling application. This method produces a result rowset based on the underlying security object definition. In this usage there are three known values and one unknown value. The three known values consist of a membership security object type, a view list object type, and either a membership object ID, and or a view list membership object ID. Based on the ID that is provided, the API determines the security profiles that are associated to the known entity, and from the profiles determines the data that is to be provided as a result set. The API returns this data in a rowset based on the security object's list record.

- API Based SQL Data Access

  This access method is provided for instances when the results in the membership table need to be merged or joined in a larger SQL statement that is being constructed by the calling application. The known values and the method of data retrieval are the same as the direct data access method, the result of this call is a SQL select statement that returns the keys of the rows of the security object's table. This SQL statement can be used in a SQL *IN* clause or correlated sub query to limit the results of the calling application's constructed query.

- SQL/Query Based Data Access

  There may be instances in which the API cannot be used. An example of this is any time where the logic to determine a result set does not have the ability to run a PeopleCode based API, such as a standard PeopleTools prompt, a view, or a PeopleTools query. For these use cases the design provides example SQL that can be used to join the security data model.

- Functional option Conflict Resolution

  In instances where a key resolves the same functional option multiple times with different properties, the conflict needs to be resolved. Gathering the functional options and privilege overrides is possible using a SQL UNION, but the resolution of the rules is not possible within a single SQL select statement. This requires impacted applications to be in an environment where it is possible to run PeopleCode to determine the applicable functional options. Because of this functional options are not be determined or executed in a view or query type access method.

- Executing Functional Options

An abstract class/interface is provided to model functional option classes. This class is used by the runtime application to run the functional option logic. The runtime class provides access to the logic that is relevant to the application and coded in the attached application class. The class also provides the ability to access the functional option amount value, operator, base currency, and perform currency conversion if required. The runtime API provide a method to pass multiple functional option codes, and execute them. A calling application's framework could leverage this to provide data driven execution.

- Update to Data Cache

Applications that are responsible for the security objects' secured data require access to update the security cache when a change is made. Since it is possible that a configurable search definition references any data for a given object, all additions and updates to these objects trigger a cache refresh. The known values in this case are the security object type, and security object ID. The API triggers the data caching process providing the known values as parameters. These parameters trigger the caching process to deal only with data that is relevant (for example, the specific object ID).

- Update to Security Framework

This access method is provided for instances where it is required to update the security framework data directly in a batch or EIP type mode. The API provides access to create membership, view privilege, functional option, and security key objects. The system provides methods to create the associations between the various security objects, and keys. Security Object types (for example, partners and customers) cannot be created through the API. Since there is not a lot of business logic tied to the security setup components, the API uses SQL objects to update the framework tables directly rather than building component interfaces.

Note. To improve runtime performance, the result sets for static and dynamic membership and view privilege domains are cached into database list tables. Dynamic implicit domains are cached by spawning security keys for each member in the domain. An Application Engine process provides the mechanism for creating the cache tables that store the membership and view privilege lists.

Distributed Security

This section discusses:

- Delegated administration.
- Role can grant hierarchies.
- Creating security groups.

Delegated Administration

Distributed security, or delegated administration, is the ability to securely delegate administrative responsibility to multiple administrators and managers in an organization (within or external to the enterprise). If you have a large number of partners and high turnover among partner users that you don't manage directly, it is very time consuming to keep track of partner user IDs and access in a centralized administrative function. Delegated administration enables you to set up partner administrators so that they can keep track of partner user access, within the confines of the permissions that you allow the partner administrator to grant

Role Can Grant Hierarchies

PeopleSoft delivers roles within PeopleTools that give administrators the ability to grant roles to other users in a logical way that represents a hierarchy. For example, when the enterprise administrator and the partner administrator are setting up partner users, they can only grant roles for which they are authorized. Partner administrators, in turn, can access the partner organization tree (sales territory tree), define the partner organization, and create partner users only using roles that the partner administrator can grant.

Role	Can Grant Roles
Enterprise channel manager	Partner admin Partner sales manager Partner Representative
Partner administrator	Partner sales manager Partner representative
Partner sales manager	Partner representative

Creating Security User Groups

PeopleSoft Partner Relationship Management (PRM) supports the use of a territory tree for partners. In distributed security, territory trees are referred to as user groups.

An enterprise can implement user groups in PeopleSoft Partner Relationship Management to set boundaries and limits around what partners can do with territory configuration. A partner manager or partner administrator can modify their own territories to show only their own partner nodes and add and delete individual partner representatives to different nodes of a territory tree managed by the partner administrator.

To implement security user groups, an enterprise completes these setup tasks:

- The enterprise administrator creates the partner territory tree initially.

- For partner organization, the enterprise administrator creates a user group.

  For example, you may create a user group called *Channel* to hold all channel partners and add the enterprise channel manager as primary owner of the user group.

- The enterprise channel manager creates a user group.

  For example, you may create a user group called ABC Warehouse with the IBM Channel user group as the parent for the partner company IBM. In addition, you create a partner administrator called Sally Smith as the owner. On completion of the task, the system sends an email notification to the Sally Smith, the partner administrator.

See Also

PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook, "Setting Up and Managing Partner Registration," Setting Up Partner Registration

Enterprise PeopleTools PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Setting System-Wide Security Options

To setup system-wide security options, use these components

- Security Options (SECURITY_OPTIONS).
- Security View Names (SECURITY_VIEW_NAMES).
- Apply Security (APPLY_SECURITY).

- Security SetID Class (SEC_SETID_CLS).

- Security SetID Operator (SEC_SETID_OPR)

- Security Business Unit Class (SEC_BU_CLS)

- Security Business Unit Operator (SEC_BU_OPR)

- Operator Defaults (OPR_DEFAULT)

- Role Worker (RB_ROLE_WORKER).

- Security Views (SECURITY_VIEWS)

This section provides overviews of row-level security views, sensitive worker information, and predefined security roles and sample users and discusses how to:

- Select system-wide security options.

- Activate security options.

- Define view security.

- Define business unit security by permission list.

- Define business unit security by user ID.

- Define tableset security by permission list.

- Define tableset security by user ID.

- Define overall preferences.

- Define call center preferences.

- Define sales preferences.

- Define change management preferences.

- Define account preferences.

- Define roles with access to sensitive worker information.

Understanding Row-Level Security Views

Business units and setIDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to the values that are defined for the edit table. With PeopleSoft row-level application security, you can specify which values in the edit table are available in a particular view.

Views enable you to access data horizontally for multiple tables. Views are Structured Query Language (SQL) statements that filter out data rows. Users with permission to access particular setIDs or business units see only a subset of the values in the edit tables.

After you set up views, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from particular roles.

Security View Names

PeopleSoft delivers applications with security views that apply to key fields in the system. You can alter these views or build views of your own; however, they would be considered a customization. View names include suffixes that reflect the type of security for the view. This table lists the view name suffixes and describes the corresponding security type.

View Name Suffix	Security Type
NONVW	No security.
OPRVW	User security.
CLSVW	Permission list security.

Note. Although PeopleSoft generally follows this naming convention, the system does not enforce it. As long as you have the view defined in the security view names grid the view name will work.

Row-Level Security for Users

After you select security options and set up security view names, define the security-controlled field values that each user or permission list can access. When you secure key fields in the application, the pages that you use depend on the level of system security that you select. If you select user-level security, use the user security pages. If you select role-level security, use the permission list security pages.

Understanding Sensitive Worker Information

PeopleSoft uses enterprise integration points to transmit worker data from PeopleSoft Human Resources Management (PeopleSoft HRMS) to PeopleSoft Enterprise CRM. Most of the data that PeopleSoft Enterprise CRM subscribes to from PeopleSoft HRMS is sensitive.

Some users, however, should not have access to this data. To give users access to sensitive and semi-sensitive data, you must select the roles that are associated with the users and then indicate what type of information is available to them—either confidential or home contact information.

Users who have sensitive (confidential) data access defined in the Secured Worker Role setup page, can view date of birth, age, national ID, gender, and employee status fields in the Worker and Case components; otherwise, the system hides this information. Users who have semi-sensitive data (home contact) access can view home address, home phone, home email, and home pager fields for a worker.

If a role doesn't have access to sensitive or semi-sensitive data, then all users belonging to the role cannot view the associated fields on the pages in the Worker and Case components.

Warning! When users have access to sensitive or semi-sensitive data, the system enables them to edit some pages. If a user modifies a field in PeopleSoft Enterprise CRM, the changes could be overwritten the next time that a PeopleSoft HRMS message is transmitted to PeopleSoft Enterprise CRM because the information comes to PeopleSoft Enterprise CRM through a one-way transmission from PeopleSoft HRMS.

See Also

Predefined Security Roles and Sample Users

PeopleSoft provides several roles with predefined user profiles and permission lists in the demonstration database. You can use these sample security configurations as they are delivered, or you can modify them to meet your specific security requirements. The roles and permissions are part of the system data, and the users are part of the sample data delivered in the demonstration database.

This section discusses:

• PeopleSoft Enterprise CRM system IDs.

• PeopleSoft HelpDesk and PeopleSoft Support user IDs.

• PeopleSoft Integrated FieldService user IDs.

• PeopleSoft financial services industry user IDs.

• PeopleSoft communication industry user IDs.

• PeopleSoft high tech industry user IDs

• PeopleSoft government industry user IDs

• PeopleSoft Marketing user IDs.

• PeopleSoft Sales user IDs.

• PeopleSoft Order Capture and Services Management user IDs.

• PeopleSoft Order Capture Self Service user IDs.

• PeopleSoft Real-Time Advisor user IDs.

• PeopleSoft Quality user IDs.

• PeopleSoft insurance industry user IDs.

• PeopleSoft energy industry user IDs.

• PeopleSoft multichannel applications user IDs.

• PeopleSoft Partner Relationship Management user IDs.

• PeopleSoft Strategic Account Planning user IDs.

• PeopleSoft Wealth Management user IDs.

PeopleSoft Enterprise CRM System IDs

PeopleSoft delivers predefined user IDs, passwords, and associated roles for PeopleSoft Enterprise CRM.

Note. To look up role information for a user ID, select PeopleTools, Security, User Profiles, User Profiles and then click the Roles tab.

The tables that follow list the delivered PeopleSoft user IDs and passwords:

User ID and Password	Description
SYSADM	System Administrator
EMPL	Employee
MGR	Line Manager

PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft Support User IDs

This table lists the predefined user IDs and passwords for PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft Support:

User ID and Password	Description
CCAG	Call Center Agent
CCMGR	Call Center Manager
HELPAA	Help Desk Applications Administrator
HELPAG	Help Desk Agent
HELPMGR	Help Desk Manager
HHDCAN_ADMIN	HR HelpDesk Administrator (Canada)
HHDCAN_AGT1	HR HelpDesk Agent 1 (Canada)
HHDCAN_AGT2	HR HelpDesk Agent 2 (Canada)
HHDCAN_AGT3	HR HelpDesk Agent 3 (Canada)
HHDCAN_MGR	HR HelpDesk Manager (Canada)
HHDUSA_ADMIN	HR HelpDesk Administrator (USA)
HHDUSA_AGT1	HR HelpDesk Agent 1 (USA)
HHDUSA_AGT2	HR HelpDesk Agent 2 (USA)
HHDUSA_AGT3	HR HelpDesk Agent 3 (USA)
HHDUSA_MGR	HR HelpDesk Manager (USA)
SOLTNMGR	Solution Manager

User ID and Password	Description
SUPPAA	Support Applications Administrator
TECHSPEC	Technical Specialist

PeopleSoft Integrated FieldService User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Integrated FieldService:

User ID and Password	Description
DISPATCH	Dispatcher
FSAA	Field Service Applications Administrator
FSAG	Field Service Agent
FSENG	Field Service Engineer
FSMGR	Field Service Manager
FSPART	Field Service Partner
INVAG	Inventory Agent
INVMGR	Inventory Manager
PRODMGR	Product Manager
PURCHAG	Purchasing Agent
RECAG	Receiving Agent
TECHSUP	Technical Support

PeopleSoft Financial Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Financial Services:

User ID and Password	Description
FSIADMIN	FSI Administrator
FSIAGENT	FSI Agent
FSISS	FSI Self-Service
FSIMGR	FSI Account Manager

PeopleSoft Communication Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft communication industry

User ID and Password	Description
CSPADMIN	CSP Administrator
CSPAGENT	CSPA Agent
CSPSS	Communication Self-service Consumer
GUESTCOMM	Guest - Communication

PeopleSoft High Tech Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft high technology industry.

User ID and Password	Description
HITECHADMIN	High Technology Administrator
HITECHAGENT	High Technology Agent
HITECHSS	High Technology Self-Service
HITECHGUEST	High Technology Guest

PeopleSoft Government Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft government industry.

User ID and Password	Description
GOVADMIN	Government Administrator
GOVAGENT	Government Agent
GOVSS	Government Self Service
GOVGUEST	Government Guest
GOVMGR	Government Manager

PeopleSoft Marketing User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Marketing:

User ID and Password	Description
CAMPMGR	Campaign Manager
MKTAA	Marketing Application Administrator
MKTANAL	Marketing Analyst
MKTCRT	Marketing Creative
MKTMGR	Marketing Manager
MKTRES	Marketing Researcher
SRVCONA	Service Contract Administrator
TELAG	Telemarketing Agent
TELFFLAG	Telemarketing Fulfilment Agent
TELMGR	Telemarketing Manager
TELSLAG	Telemarketing Sales Agent

PeopleSoft Sales User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Sales:

User ID and Password	Description
SLSREP	Inside Sales Rep
FLDSLSREP	Field Sales Rep
SLSMGR	Sales Manager
LDQUAL	Lead Qualifier
SLSAA	Sales Application Administrator
CHSLSMGR	Channel Sales Manager

PeopleSoft Order Capture and Services Management User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture and Services Management:

User ID and Password	Description
OCADMIN	Order Capture Administrator
OCMGR	Order Capture Manager
OCREP	Order Capture Representative
FSIADMIN	FSI Administrator
FSIAGENT	FSI Agent
CSPADMIN	CSP Administrator
CSPAGENT	CSPA Agent
INSADMIN	Insurance Administrator
INSAGENT	Insurance Agent

User ID and Password	Description
ENERGYADMIN	Energy Administrator
ENERGYAGENT	Energy Agent

PeopleSoft Order Capture Self Service User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture Self Service:

User ID and Password	Description
CPCUST	Customer
CPSS	Customer Self Service
CSPSS	Communication Self-Service Consumer
GUEST	Guest
COMGUEST	Guest - Communication
ENERGYGUEST	Guest - Energy
GOVGUEST	Guest - Government
GUESTCOMM	Guest - Communication
HITECHGUEST	High Technology Guest
INSGUEST	Insurance Guest
USGUEST	Guest - US001 (USA)

PeopleSoft Real-Time Advisor User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Real-Time Advisor:

User ID and Password	Description
RADADMIN	Advisor Administrator
RADUSR	Advisor User
RADMGR	Advisor Manager

PeopleSoft Quality User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Quality:

User ID and Password	Description
QAANAL	Quality Analyst
QAAA	Quality Application Administrator
QAMGR	Quality Manager

PeopleSoft Insurance Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft insurance industry:

User ID and Password	Description
INSADMIN	Insurance Administrator
INSAGENT	Insurance Agent
INSSS	Insurance Self-Service
INSGUEST	Insurance Guest

PeopleSoft Energy Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft energy industry:

User ID and Password	Description
ENERGYADMIN	Energy Administrator
ENERGYAGENT	Energy Agent

User ID and Password	Description
ENERGYSS	Energy Self-Service
ENERGYGUEST	Guest - Energy

PeopleSoft Multichannel Applications User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft multichannel applications:

User ID and Password	Description
ERMSMGR	ERMS Manager
ERMSAGENT	ERMS Agent

PeopleSoft Partner Relationship Management User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Partner Relationship Management:

User ID and Password	Description
ECM	Enterprise Channel Manager
PADMIN	Partner Administrator
PMGR	Partner Manager
PREP	Partner Rep
PMKTA	Partner Marketing Analyst
PMKTM	Partner Marketing Manager

PeopleSoft Strategic Account Planning User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Strategic Account Planning:

User ID and Password	Description
AASH	Account Administrator
ACCOUNTMGR	Account Manager

PeopleSoft Wealth Management User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Wealth Management:

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User ID and Password	Description
WMADMIN	Wealth Management Administrator
FA	Financial Advisor

Pages Used to Set System-Wide Security Options

Page Name	Object Name	Navigation	Usage
Security Options	SECURITY_OPTIONS	Set Up CRM, Security, Security Options, Security Options	Select the type of security to implement (user or permission list) and the key fields that are controlled by the security settings.
Apply Security	RUN_FIN9001	Set Up CRM, Security, Apply Security Setups, Apply Security	Initiate the process that activates the selected security options.
Security Views Names	SECURITY_VIEWS	Set Up CRM, Security, Security View Names, Security Views Names	Define the type of security for each view in the system. The Apply Security Setups process changes the security view names to match the levels of security for each view. These names use the file extensions for the corresponding security type.
Business Unit Security by Permission List	SEC_BU_CLS	Set Up CRM, Security, Unit by Permission List, Business Unit Security by Permission List	Grant access to a business unit by using a permission list.
Business Unit Security by User ID	SEC_BU_OPR	Set Up CRM, Security, Unit by User ID, Business Unit Security by User ID	Grant access to a business unit by using a user ID.
TableSet Security by Permission List	SEC_SETID_CLS	Set Up CRM, Security, TableSet by Permission List, TableSet Security by Permission List	Grant access to a tableset using a permission list.
TableSet Security by User ID	SEC_SETID_OPR	Set Up CRM, Security, TableSet by User ID, TableSet Security by User ID	Grant access to a tableset by using a user ID.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Define overall preferences for a specified PeopleSoft user.
User Preferences - Call Center Preferences	OPR_DEF_TABLE_RC	Set Up CRM, Security, User Preferences, Call Center	Define preferences for call center agents and other users of the Case component.
User Preferences - Sales Preferences	OPR_DEF_TABLE_RSF	Set Up CRM, Security, User Preferences, Sales	Define preferences for sales representatives.

Page Name	Object Name	Navigation	Usage
Change Management	OPR_DEF_TABLE_RG	Set Up CRM, Security, User Preferences, Change Management	Select user default values that you want the system to display on the Change Request page in PeopleSoft HelpDesk.
Account	OPR_DEF_TABLE_RSP	Set Up CRM, Security, User Preferences, Account	Select default values that you want the system to use when it does account assignments.
Secured Worker Role	RB_ROLE_WORKER	Set Up CRM, Security, Secured Worker Role, Secured Worker Role	Define user roles that can access sensitive and semi-sensitive worker information.

Selecting System-Wide Security Options

Access the Security Options page.

Security Options page

Type of Security

No Security   Select to disable PeopleSoft application security. All users who are authorized to access a page can select any valid setID or business unit. PeopleSoft Enterprise CRM applications are delivered with security disabled.

User ID Level Security and   Select to enable PeopleSoft application security by user ID or permission list.
Permission List Level   Each option controls which rows of data a user can see based on user ID
Security   or permission list.

Secured Fields

Business Unit   Select to implement security for the Business Unit field, which is the primary key for many transactional data tables. In some situations, the Business Unit field is a non-key field on a record.

SetID   Select to implement security for the SetID field, which is the primary key for many setup and rules tables. In some situations, the SetID field is a non-key field on a record.

Activating Security Options

Access the Apply Security page.

Apply Security page

Select the language that you are using to apply security and then click Run to load the security views that you created.

Defining View Security

Access the Security View Names page.

Security View Names page

Search Text   Displays the view name prefixes supplied by each application. When you run the Apply Security Setups process, the system searches for view names that begin with these prefixes. If a view name begins with a prefix from this list, the process changes the view name extension to match the security type that you selected in the security options. The system stores the list in the SEC_VIEW_NAMES table, where you can review or update this information. You can also configure new security views for the system on this page.

Note. There is no need to access this page unless you want to implement customized security views.

No Security View **User ID Security View** and **Permission List Security View**	Displays the different security views for the view name prefixes that are supplied by each application.
	When you run the Apply Security Setups process, the Application Engine process can switch to the Permission List Security View (CLSVW), the User ID Security View (OPRVW) or the No Security View (NONVW) based on the option you selected on the Security Options page.
Type	Select the type of field (*SetID* or *Unit*) that the security view affects.

Defining Business Unit Security by Permission List

Access the Business Unit Security by Permission List page.
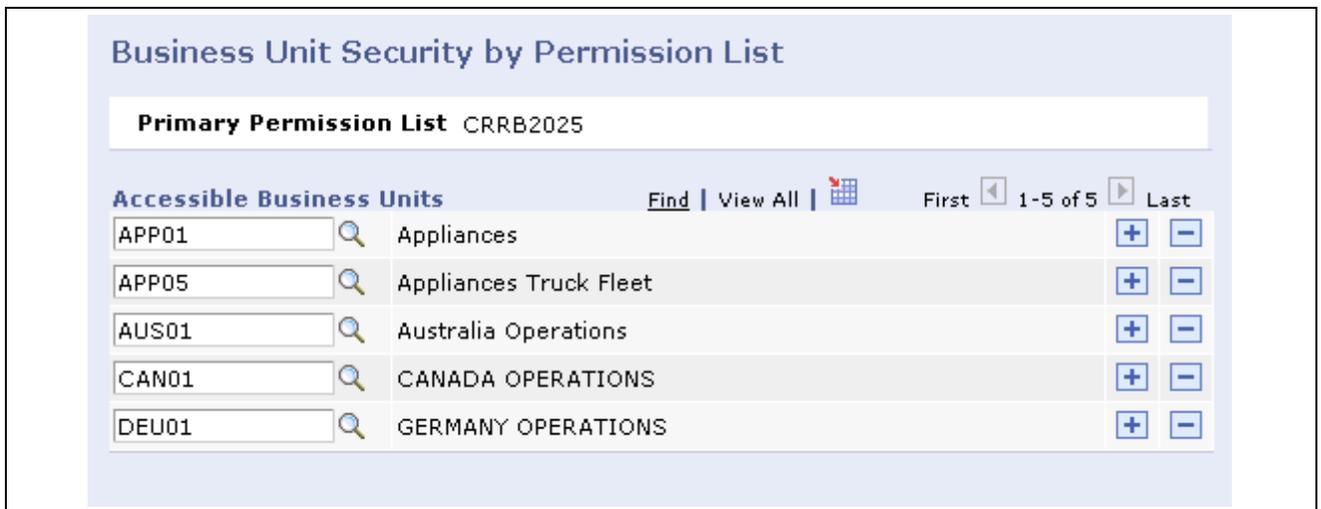
Business Unit Security by Permission List page

Select the business units to which you want the permission list to have access.

Note. PeopleSoft does not deliver any business units that are associated with permission lists. You must make this association using the Business Unit Security by Permission List page.

Defining Business Unit Security by User ID

Access the Business Unit Security by User ID page.
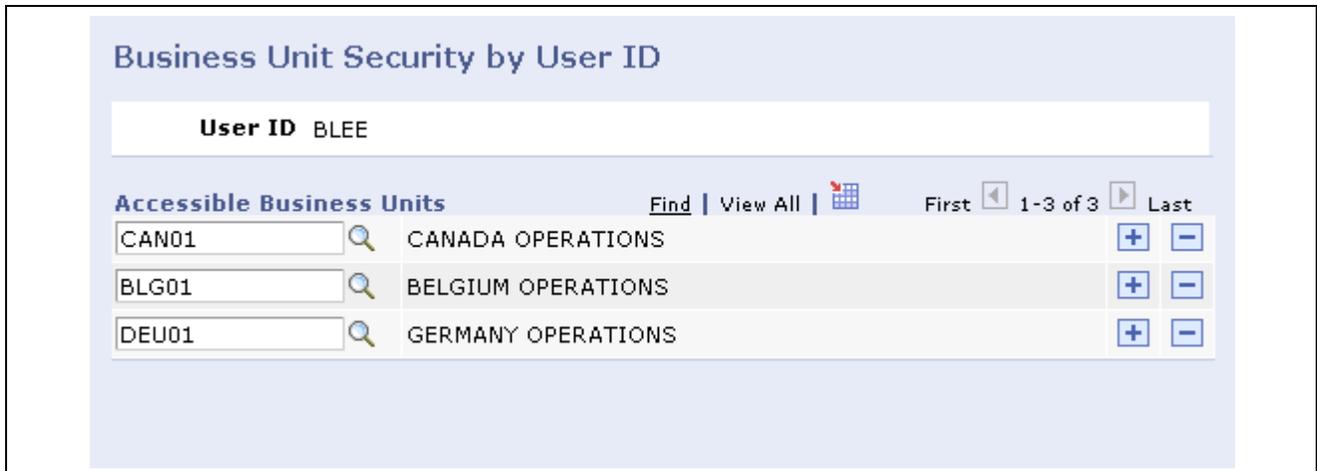
Business Unit Security by User ID page

Select the business units to which you want the user ID to have access.

Note. PeopleSoft does not deliver any business units that are associated with user IDs. You must make this association using the Business Unit Security by User ID page.

Defining TableSet Security by Permission List

Access the TableSet Security by Permission List page.
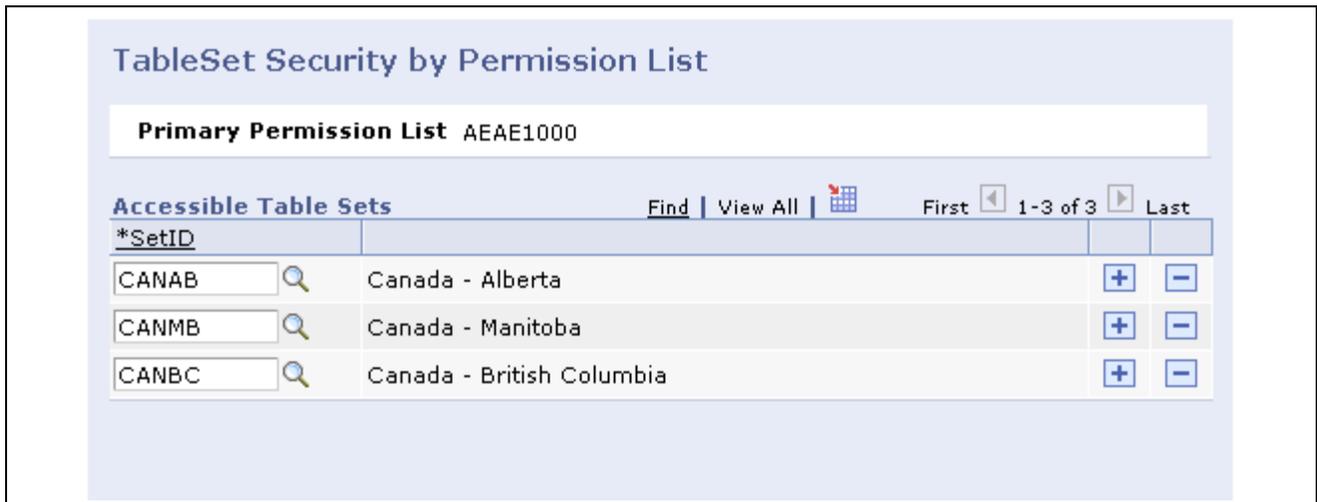
TableSet Security by Permission List page

Select the setIDs to which you want the permission list to have access.

Defining TableSet Security by User ID

Access the TableSet Security by User ID page.

TableSet Security by User ID

User ID CC587

Accessible Table Sets		Find | View All |	First ◄ 1-3 of 3 ► Last		
*SetID					
HRHDC	🔍	HR Help Desk Canada		➕	➖
HRHDU	🔍	HR Help Desk USA		➕	➖
IN100	🔍	Insurance		➕	➖

TableSet Security by User ID page

Select the setIDs to which you want the user ID to have access.

Defining Overall Preferences

Access the Overall Preferences page.

Overall Preferences page

Note. User preferences are associated with user IDs. When you create user IDs for implementation team members and PeopleSoft users, define preferences for each user.

Business Unit	Select the user's default business unit. Select a business unit that is valid for the pages that the user normally accesses.
SetID	Select the default setID for this user. The setID represents a set of control table information. SetIDs enable business units to share a set of control table information.
As of Date	Select the default date to use as the as of date when running date-driven reports and processes.
Localization Country	Select the country code for the localization country.
Requester	Enter a default requester ID to appear on requisitions that are initiated by this user from the Manage Material component in PeopleSoft Integrated FieldService or the RMA Form (return material authorization form) component in PeopleSoft Support.

> **Important!** If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing.

Role Type ID	If a self-service user has multiple roles, select the role type to use as the default when signing in to the self-service site. The only supported role types for self-service users are individual consumer (role type 9) and contact (role type 8).
Company Name	For self-service users who can represent multiple companies, select the company whose data appears when the contact first signs in.
Partner Relationship Type	Select the type of partner relationship that the user has with the company. This relationship appears when the contact first signs in. For every Partner Users that uses the PARTNER portal must have a user preference record that identifies the Partner Company and the relationship type of the user with the Partner Company.
Market	Select the preferred market for the user ID. The preferred market associated with the user ID determines what data and functionality are available to the user.
Order Capture Unit	Select the order capture unit that you want the system to use as a default for the user. This business unit is used by Order Capture, Order Capture Self Service, and product catalog.
	The system uses this business unit to derive the setID that is used to retrieve product catalogs the selected user can access (including PeopleSoft Order Capture Self Service guest user IDs). If this business unit is not specified, the system looks up the order capture business unit (marked as default business unit) that is defined under Set Up CRM, Business Unit Related, Order Capture Definition, Business Unit, Order Capture Definition.
	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "Defining Order Capture Business Units".
Mobile Customer Options	Select the mobile customer option for which you want to establish system-level defaults. Mobile customer options are created using the Mobile Customer Options page using Set Up CRM, Install, Mobile.
PIM Preference ID (personal information manager preference ID)	Select the preference ID that you want the system to use if the user is a personal information manager.
Alternate Character Enabled	Select to activate the fields that support alternate character functionality in application pages that are so enabled. The alternate character fields do not appear on application pages until you select this check box.
Wealth Management	Select if the user is a client manager. When the user accesses the PeopleSoft Strategic Account Planning application, the system opens the My Clients page.

See Also

PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook, "Using PeopleSoft Enterprise Mobile Order Capture"

Defining Call Center Preferences

Access the Call Center page.

Call Center page

Default Business Units

Primary   Select this check box if you want the system to use the display template, component, market, and business unit as the user's primary default.

Selecting a primary business unit provides the system with a default for items that are call-center related. It does not affect functionality that is business-unit driven such as the category/type/detail set up table default or solution searching in self-service.

Template Family   Select the display template family that you want the system to default to for the user. Once an agent opens a case, however, the agent cannot change the display template family. Depending on how you configure your system, an agent can use different display templates to view information for the same case.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options," Display Template Families.

Component   Select the component that you want the system to default to for the user. Components can be associated with multiple display templates, each of which provides a different presentation of a page.

Business Unit   Select the business unit that you want the system to default to for the user for the display template, component, and market.

Display Template ID   Select the display template that you want the system to default to for the user. Display templates enable you to control the appearance and behavior of components (pages or sets of pages) for your various business needs.

Frequently Used Solution

Maximum Solutions to Display   Enter the maximum number of solutions that are to appear on the Frequently Used Solutions page.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Configuring Display Templates"

Defining Sales Preferences

Access the Sales page.

Sales Preferences page

Sales Defaults

Sales Business Unit	Select the assigned business unit.
Tree Name	Select the default sales territory tree to which the sales user can be assigned.
Assignment Group	Select in what kind of assignment group that you want this sales user to appear.
	Note. Assignment group is part of territory assignment criteria.
Field Delimiter	Choose to use delimiters other than the comma, such as the semicolon. This is used for lead import.
Auto Insert to My Contacts	Select to enable the user to automatically insert contacts for a company, person, lead, or opportunity to the user's My Contacts list. The insert is triggered when the user clicks the Add to My Contacts toolbar button and the user is either an account owner or account team member for the company, person, lead, or opportunity.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Setting Up Sales Security and Personalization"

Defining Change Management Preferences

Access the Change Management page.

Change Management page

Select the values that you want the system to display by default for the user on to the Change Request page in PeopleSoft HelpDesk.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Using Change Management"

Defining Account Preferences

Access the Account page.
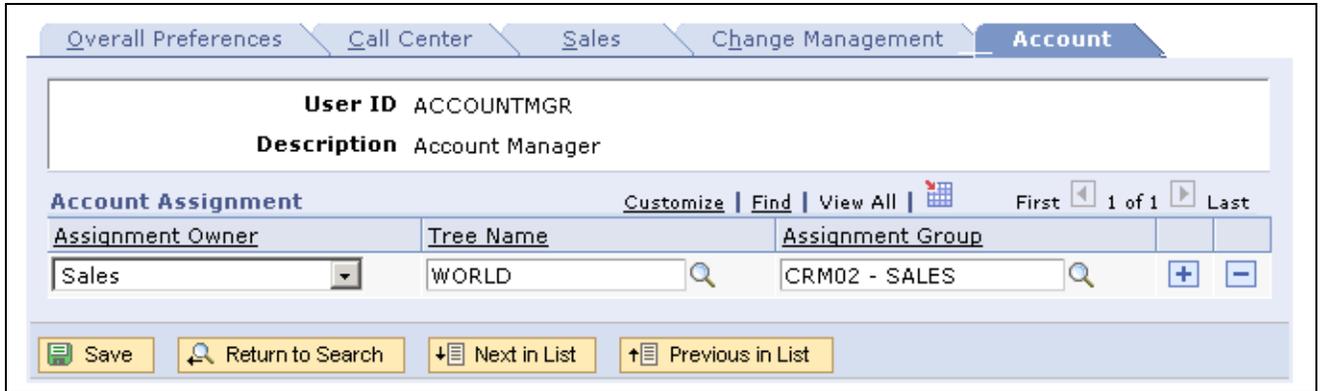
Account page

Select the values that you want the system to use when it assigns accounts to the user.

See Also

PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook, "Getting Started with PeopleSoft Enterprise Bill Presentment and Account Management"

Defining Roles with Access to Sensitive Worker Information

Access the Secured Worker Role page.

Secured Worker Role page (1 of 2)

Secured Worker Role page (2 of 2)

Note. This security applies to the worker component only, not the case. You may use a HelpDesk for Human Resources case template, which displays some of these fields in the Case component, without checking these security options.

Role Access to Data

Role Name	Select the role that needs access to sensitive and semisensitive data. The roles that are defined in the example are from sample data that PeopleSoft delivers with the application. If you want to create your own roles and use them here, you must first define them in the Roles component. Select PeopleTools, Security, Permissions & Roles, Roles.
Confidential Information	Select this check box to enable the role to have access to these worker fields: Gender, DOB (date of birth), Age, National ID, and Employee Status.
Home Contact Methods	Select this check box to enable the selected role to have access to these worker fields: Home Address, Home Phone, Home Email, and Home Pager.
Correct Job Details	Select this check box to allow the selected role to view and change all existing rows and to add new rows with no effective date restrictions. Otherwise, the selected role can change only future rows and enter new rows with an effective date greater than the current row.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Defining EIP Options for Integration to PeopleSoft HRMS"

Implementing Self-Service Security

To implement self-service security, use the Security Privilege (RB_SRTY_PRIV_DELTA), Role Privilege (RB_SRTY_PRIV_DFLT), Guest Registration (RX_GUEST_REG_TMPLT), Customer Registration (RX_CUST_REG_TABLE), Representative Registration Table (RX_REP_REG_TABLE), Security Privilege (RB_SRTY_PRIV), and Registration Text Setup (RX_REGTXT_SETUP), components.

This section provides overviews of privilege codes and custom privilege codes and discusses how to:

• Establish privilege codes and custom privilege codes.

• Assign privileges to users.

• Assign privileges to roles.

• Set up existing customer user registration templates.

- Register business users.
- Set up guest users.
- Set up terms and conditions for self-service users.
- Set up terms of service for self-service users.
- Set up privacy policies for self-service users.

Understanding Privileges Codes

The self-service functionality within PeopleSoft Enterprise CRM applications includes a predefined set of privilege codes. Assign these privilege codes to users or roles to provide security for particular types of transactions, as defined in the usage column in this table:

Privilege Code	Description	Usage	Is Amount Associated?
ORDERSAVE	Save orders.	Enable users to save orders. (The button is available or unavailable.)	No.
QUOTESAVE	Save quotes.	Enable users to save quotes. (The button is available or unavailable.)	No.
ADDRMAINT	Maintain existing address.	Enable users to update existing addresses. (The button is available or unavailable.)	No.
ADDRMAINTCNT	Maintain existing contact.	Enable users to update existing contacts.	No.
ADDRNEW	Add new address.	Enable users to add new addresses. (The button is available or unavailable.)	No.
ADDRNEWSITE	Convert address to site.	Enable users to convert the address to site. (The button is available or unavailable.)	No.
ADDRNEWCNTCT	Add new contact person.	Enable users to add a new contact person. (The button is available or unavailable.)	No.
NEWACCT	Create new account.	Enable users to create a new account.	No.

Privilege Code	Description	Usage	Is Amount Associated?
VIEWALLORDRS	View all orders.	Enable users to view all orders placed by others with an amount less than the amount specified. (The rows are available or unavailable.)	Maybe. You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.
VIEWALLQUOTS	View all quotes.	Enable users to view all quotes that were placed by others with an amount that is less than the amount specified. (The rows are available or unavailable.)	You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.

Understanding Custom Privilege Codes

You can define your own privilege codes and associate them with transactions on the User Privileges page and Role Privileges page. After you define the privilege codes, you must add the custom code to the transaction that has the custom security level.

To define a privilege code that prevents consumers from ordering more than 100,000 USD worth of goods:

1. Define the Order Amount privilege code (CUSTORDAMT).

2. On the Role Privileges page, assign the privilege code to the individual consumer role and specify that the amount must be less than 100,000 USD.

3. On the FieldChange event of the Order Submit button, add the following code:

```
Declare Function IsTransactionAuthorized PeopleCode FUNCLIB_RB.SRTY_PRIV_CD FieldFormula;

Local number &output_msg_set_nbr, &output_msg_nbr;

If Not IsTransactionAuthorized(&roleType, &strPersonID, &numBOIDCustomer,
 CUSTORDAMT, &numAmount, &output_operator_cd, &output_amount_qty, &output_msg_set_nbr, &output
   If All(&output_msg_set_nbr, &output_msg_nbr) Then
      Error MsgGet(&output_msg_set_nbr, &output_msg_nbr, "Message Not Found.");
   End-If;
End-If;
```

In the preceding code example, pass &roleType as *9* (the Individual Consumer role). Pass &strPersonId as the person ID, and pass &numBOIDCustomer as the customer's business object ID. The privilege code is CUSTORDAMT, which is your defined custom privilege code. &numAmount is the amount of the customer's order. The remaining parameters are output parameters that you do not need to pass.

Use the delivered PeopleSoft Enterprise CRM self-service code as an example to customize security of other transactions.

Pages Used to Implement Self-Service Security

Page Name	Object Name	Navigation	Usage
Security Privilege Code Setup	RB_SRTY_PRIV	Set Up CRM, Security, Self-Service, Privilege Codes, Security Privilege Code Setup	Define the privileges that are associated with the privilege codes.
Assign User Privileges	RB_SRTY_PRIV_DELTA	Set Up CRM, Security, Self-Service, User Privileges, Assign User Privileges	Assign user privileges.
Assign Role Privileges	RB_SRTY_PRIV_DFLT	Set Up CRM, Security, Self-Service, Role Privileges, Assign Role Privileges	Assign privileges to roles.
Existing Customer User Registration Setup	RX_CUST_REG_TABLE	Set Up CRM, Security, Self-Service, Existing Customer Registration, Existing Customer User Registration Setup	Create templates of records and fields to be used on the User Registration Setup page.
Business User Registration Setup	RX_REP_REG_TABLE	Set Up CRM, Security, Self-Service, Business User Registration, Business User Registration Setup	Register business users.
User Registration Setup	RX_GUEST_TEMPLATE	Set Up CRM, Security, Self-Service, User Registration, User Registration Setup	Register guest users.
Self Service Registration	RX_REGTXT_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Self Service Registration	Set up terms and condition statements for users completing self-service registration.
Terms of Service	RX_TERMS_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Terms of Service	Set up terms of service statements for users completing self-service registration.
Privacy Policy	RX_PRVACY_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Privacy Policy	Set up privacy policy statements for users completing self-service registration.

Establishing Privilege Codes and Custom Privilege Codes

Access the Security Privilege Code Setup page.

Security Privilege Code Setup page

Enter a description of the privilege code that you are adding.

Assigning Privileges to Users

Access the Assign User Privileges page.

Assign User Privileges page

Define user privileges by associating a person with a business contact and assigning privilege codes. The business contact is typically a customer that the person represents. The user privileges enable you to define self-service security more specifically than the role privileges.

For example, suppose that a contact's role privileges do not enable the contact to update customer address information. If you need to enable a particular contact to update addresses, you could do that by assigning the user privilege to that contact. Conversely, suppose that a contact's role can submit a quote, but you want to revoke a particular contact's privilege to submit quotes. You do that by adding the privilege for submitting quotes and then selecting the Revoke check box.

Business Contact Name and **Privilege**	Select the business contact's name and the privilege code.
Revoke	Select to revoke a privilege.
Operator and **Amount**	For transactions that are dependent on an amount, you can define privileges that are associated with particular amounts. If the system authenticates the

user for the amount, it displays the appropriate information. For the Amount field, only numeric values are relevant; the system does not take the currency into account.

Message Set Number and   Associate a default message in case of authorization failure. If authorization
Message Number   fails, the transaction that failed can display the default message or its own
                               message.

PeopleSoft Order Capture Self Service is delivered with two privilege codes that are built to use privilege amounts: View All Orders (VIEWALLORDRS) and View All Quotes (VIEWALLQUOTS). These privileges are associated with an amount that further restricts access to order or quotes over a certain dollar amount.

Assigning Privileges to Roles

Access the Assign Role Privileges page.

Assign Role Privileges page

Only two business object roles (as defined in the Customer Data Model) are supported with PeopleSoft Enterprise CRM self-service. These are consumer and contact. View the sample data for the role privileges and follow the sample as a guideline. If you have transactions for which data filtration is based on an amount, use the Amount field.

Amount   Use this field if you have transactions for which data filtration is based
                               on an amount.

Message Set Number and   Associate a default message in case of authorization failure. If authorization
Message Number   fails, the transaction that failed can display the default message or its own
                               message.

Setting Up Existing Customer User Registration Templates

Access the Existing Customer User Registration Setup page.

Existing Customer User Registration Setup page

Use this page to set up templates for the fields and records that you want to use for customer registration. Once you save the template, you can select it from the Template field within the Customer Registration Fields group box on the User Registration Setup page.

When you set up existing customer user registration, you specify the information that customers enter to verify their status as existing customers. The system uses this as a template that appears for customers to enter the information

Note. For security reasons, set up at least two keys that are known only to the user.

Registering Business Users

Access the Business User Registration Setup page.

Business User Registration Setup page

To administer self-registration as a business user (a contact of a company), use the Business User Registration Setup page to establish a company code and password (company key).

The company name is the company for whom you are setting up the registration keys. When a self service user or external company administrator uses the company key to register, the user that is created by the system is tied to the company defined on this page.

Company Key	Enter a value that you provide to a company administrator so that their users can self-register and gain access to the site. The company code and key are used to authenticate users who attempt to register at the self-service site.
Max Registrations Allowed (maximum registrations allowed)	Enter the number of users that are permitted to register with this specific company code.
Assign contact Roles	Select *Sold To, Bill To,* or *Ship To* to establish the capacity of the business users that represents the company.

Setting Up Guest Users

Access the User Registration Setup page.

User Registration Setup page (1 of 2)

User Registration Setup page (2 of 2)

Self-service security is controlled by privileges that you establish and assign to guest user IDs. When a user registers, the system clones the currently active guest ID, with all its access privileges, to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

See Chapter 20, "Setting Up Customer Self-Service," Setting Up Guest IDs to Access Self-Service Sites, page 302.

To administer registration through PeopleSoft Enterprise CRM self-service, you must set up a guest user ID. The guest user acts as an administrator and provides the defaults that are necessary to establish new users.

User ID	Displays the guest user ID, which is used to make the self-service site available to anonymous users. You can add several guest users. Associate each guest user with a different business unit that is defined on the User Preferences page. By defining several guest users, you can provide access to different self-service sites that support different segments of the business.
	For example, suppose that the user ID *GUEST* is associated with business unit US001, which sells sporting good products. The user ID *GUESTCOMM* is associated with business unit COM01, which sells telecommunications products. When you implement these sites, you can define both guest users, and users can access either site depending on the guest user ID that they supply.
	Similarly, you can make the language of a site dependent on the guest user ID.
Password	Enter the exact password that authenticates the guest user. The user ID and password in combination are either appended to the URL string that provides direct access to the site or is placed in the config.properties file in PeopleTools installation.
	Refer to the installation instructions for more information about installing direct access to your website.
Password Never Expires and **Password Expires in Days**	Select one of these values to indicate when the password expires. If you select *Password Expires in Days,* enter the number of days.

Consumer Name	Select the template that you want to use for the consumer name. Guest users visiting the self-service site might create their own accounts but only provide minimal information, such as user ID, password, name, email, phone, and address information. The guest user does not enter other required information, such as currency, payment method, and carrier information, which appears by default from the template consumer.
Process Profile and **Primary**	Assign an appropriate permission list that has access to run batch processes. This permission list is copied to the new user that is created through self-service.
Template	Select the template that contains the fields and records that you want to use for guests using self-service registration.
Terms and Conditions	Select the template that contains the terms and conditions, terms of service, and privacy statements that you want to use for guests using self-service registration.
Catalog and **Customer Care**	Select the item to which you want to direct self-service users.
Role Name	Grant roles for consumer and business users by selecting role names from the lists in the Grant Consumer Role(s) and Grant Business User Role(s) grids. You can add as many roles as you want. When a consumer is created, the consumer roles that you specify are assigned to the new consumer user; and when a business user is created, the business user roles that you specify are assigned to the new business user.

To enable guest users to create their own user IDs, you must define the roles that a guest user can grant to create self-service users.

For example, in the delivered sample data, the GUEST role and the PeopleTools role UPG_ALLPAGES can grant the consumer role. When the VP1 user signs in to set up the guest user registration, that user can select the consumer role. When the guest user or an anonymous user registers as a consumer, the system assigns the new user to the consumer role. |

See Also

Setting up Terms and Conditions for Self-Service Users

Access the Terms and Conditions - Self Service Registration page.

Terms and Conditions - Self Service Registration page

Enter the text for the terms and conditions that you want users to see during self-service registration.

Setting up Terms of Service for Self-Service Users

Access the Terms and Conditions - Terms of Service page.

Terms and Conditions - Terms of Service page

Enter the text for the terms of service that you want users to see during self-service registration.

Setting up Privacy Policies for Self-Service Users

Access the Terms and Conditions - Privacy Policy page.

Terms and Conditions - Privacy Policy page

Enter the text for the privacy policy that you want users to see during self-service registration.

Defining Application Security

To define application security, use these components:

- Security Profile Definition (RSEC_PROFILE_DEFN).

- Security Membership Definition (RSEC_MEMBER_DEFN).

- Security View Definition (RSEC_VIEW_DEFN).

- Security Function Definition (RSEC_FUNC_DEFN).

- Security Function Group (RSEC_FUNC_GROUP).

- Security Object Definition (RSEC_OBJECT_DEFN).

- Security Builder (RSEC_BUILDER_RUN).

- Security Static Transfer Menu (RSEC_STAT_MENU).

This section discusses how to:

- Define security objects.
- Add membership list names and descriptions.
- Select membership objects and object members.
- Select the membership type.
- Add members to a static membership list.
- Choose the dynamic criteria for the membership list.
- Add view list names and descriptions.
- Select view objects and options.
- Select the view type.
- Add members to static view list.
- Choose the dynamic criteria for the view list.
- Define functional options.
- Define functional option groups.
- Add functional option groups and view lists to the security profile.
- Add membership lists to the security profile.
- Set run controls for the list build process.
- Enter static member transfer paths.

Pages Used to Define Application Security

Page Name	Object Name	Navigation	Usage
Security Object	RSEC_OBJECT_DEFN	Set Up CRM, Security, CRM Application Security, Security Object, Security Object	Define the characteristics of the security object.
Add Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List	Enter the membership list name and description.
Add Membership List	RSEC_SRTY_WIZ1	Click Next at the bottom of the first Add Membership List page.	Select the membership object and the members to which you want the security object to apply.
Add Membership List	RSEC_SRTY_WIZ2	Click Next at the bottom of the second Add Membership List page.	Select the membership type.

Page Name	Object Name	Navigation	Usage
Add Membership List (static)	RSEC_ML_PARTNER, RSEC_ML_CUSTOMER, RSEC_ML_PART_C, RSEC_ML_PERSON, RSEC_ML_ROLE	Select Static and then click Next at the bottom of the third Add Membership List page.	Select the partners, partner contacts, customers, people, or roles that you want to add to the membership list.
Add Membership List (dynamic)	RSEC_PARTNER_SRCH, RSEC_CUSTOMER_SRCH, , RSEC_PART_CON_SRCH, RSEC_PRSN_SRCH	Select Dynamic and then click Next at the bottom of the third Add Membership List page.	Choose the dynamic criteria that you want to use to select either customers, partners, partner contacts, or persons.
Add View List	RSEC_VIEW_SMRY	Set Up CRM, Security, CRM Application Security, Add View List, Add View List	Enter the view list name and description.
Add View List	RSEC_SRTY_WIZ1	Click the Next button from the first Add View List page.	Select the security object and the members to which you want the security object to apply.
Add View List	RSEC_SRTY_WIZ2	Click Next from the second Add View List page.	Select the view type.
Add View List (static)	RSEC_VL_CATALOG, RSEC_VL_CUSTOMER, RSEC_VL_HOLD, RSEC_VL_RA_METRICS	• For catalog, hold codes, and metrics, click Next from the second Add View List page. • For customers, click Next from the third Add View List page.	View the criteria that you chose to select customers.
Add View List (dynamic)	RSEC_CUSTOMER_SRCH	Click Next at the bottom of the third Add View List page.	Choose the dynamic criteria that you want to use to select customers.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group	Group functional options.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile	Define a security profile.
Security Profile - Membership	RSEC_PROFILEMEMBER	Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership	Add membership lists to the security profile.

Page Name	Object Name	Navigation	Usage
Refresh Dynamic Lists	RSEC_BUILDER_RUN	• Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists • Click Run from the Security Profile page.	Set run controls for the List Build process.
Static Menu Transfer Path	RSEC_STAT_MENU	Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer Path	Enter static menu transfer paths.

Defining Security Objects

Access the Security Object page.

Security Object page (1 of 2)

Security Object page (2 of 2)

Object Type   Select either *Membership* or *View Privilege.* The Object type determines whether the Security Object is used for defining Membership List or View List.

View Record

View record is used to resolve the list of members for a dynamic membership or view list. The view record must be a distinct subset of the search record that is used in defining the search for dynamic criteria.

Security List Record

Select the record where you want the system to store the results of the query or static list that is associated with the security object. The security list record may vary for each security object.

Object Source Navigation

Select the object source to which you want the system to navigate while creating dynamic membership or view lists. Selecting the object source that corresponds to the security object that you are creating provides for the proper transfer of the object source during the creation of dynamic membership or view lists. Data searches that are enabled for application security are only available as part of the selection. It is important to choose the correct search definition for the security object.

Static List Navigation

Select the static list that you want the system to navigate to during the creation of the security profile.

This is the navigation that is used for entering static list data or viewing static list data that is either dynamically created or manually entered. You set up static list navigations on the Static Menu transfer page. The system builds the Static List page with the static list record as a level 1 grid.

Cache Option

Select the cache option that you want the system to use for the security object. The caching option is mainly used for partner and customer security. Basically, when a customer or a partner is added or updated in the Customer Data Model (CDM), it tells the system how often to cache the list members in the list tables and run the Application Engine job that creates the dynamic queries.

Security Object Options

Select one or multiple security object options values:

- *Allow Dynamic Members:* Select this check box if you want to create dynamic membership or view lists.

- *Allow Reuse:* Select this check box if you want to create lists that can be associated with more than one security profile. If you clear this check box, the static or dynamic lists that you create can be attached to only a single security profile, and the security list record for these security objects will contain the security profile value.

  Note. This check box is used for performance reasons. When you select this check box, the system adds the security profile ID to the Security List Table. Using this option enables the system to make a three-table join and retrieve results quickly. For example, in FSI the account holders and accounts are accessed directly through a join from the Security List tables of the account and account holders, which are joined with the Security Profile table.

- *Secure All:* Select this check box if you want the system to apply the view record on the security object definition. If you clear this check box, no security is applied on the view record. Clearing this check box also causes applications to skip the security check.

> **Note.** This check box is used for performance reasons. For example, if one of your security profiles is set up to give access to *All,* the security API will not return any data. It is implied that the calling application would display everything. In this situation users in Order Capture Administration have access to all hold codes. When the Order Capture application calls the Security API, the Security API gives the administrators access to all hold codes. In the code for the Order Capture application the system doesn't have to create an extra *Where* clause to show the filtered list of hold codes.

> **Note.** If you clear this check box, the SQL API returns a state status of three *(3).* If the SQL string that is returned contains SQL, then security must be applied. Empty strings cause the system to skip the security check. ERROR (or some other constant) indicates that the context has access to no security profiles and zero rows should be returned.

- *Allow All:* Select this check box if you want the system to display the All field when you are adding view or membership lists to the security profile.

- *Allow Multiple Members:* Select this check box if you want the system to display the Multiple Listas an available option when you are creating a view or membership lists.

- *Allow Single Member:* Select this check box if you want the system to display the Single Member as an available option when you are creating a view or membership list.

- *Show In Wizard:* Select this check box if you want the system to display the security object as a selectable option in the drop-down list box when you are creating membership or view lists.

Related Security Objects   Select the security objects that you want to associate with a security profile. When a security profile is created, the list of valid membership and view list objects are based on an intersection of the security objects.

For example, if you create a security profile for a customer view list, the system displays the person and partner membership lists in the membership object drop-down list box.

Adding Membership List Names and Descriptions

Access the Membership List page.

Add Membership List page

Enter a name for the membership list that you want to create. Select the *Active* status. Enter text that describes the type of membership list that you are creating.

Selecting Membership Objects and Object Members

Access the Add Membership List page.

Add Membership List page

Security Object   Select the security object that you want to use for your membership list:

- *Customer*

- *Partner*

- *Partner Contact*

- *Person*

- *Role*

Note. You can also create your own security object and select it from this list. You would, however, need to call the delivered security APIs at runtime to access security.

Membership Applies To   Indicate to whom you want the membership list to apply. Select:

- *All:* Select if you want to the membership list to apply to all members associated with the security object.

- *Multiple Members:* Select if you want the membership list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add Membership List page, where you can select the membership type that you want to use (either dynamic or static).

- *Single Member:* Select if you want the membership list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either customers, partners, partner contacts, persons, or roles).

Next   Click to go to the next page. The system displays a new page based on the selections that you have made on the previous Add Membership List pages.

Selecting the Membership Type

Access the Add Membership List page.

Add Membership List page

Membership Type   Select from these values:

- *Dynamic:* Select to choose a dynamic list of members. When you click Next, a search page appears based on the security object that you selected on the second Add Membership List page.

- *Static:* Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add Membership List page.

Next   Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Adding Members to a Static Membership List

Access the Add Membership List (static) page.

Add Membership List (static) page

This page displays different fields based on the security object you selected on the previous page. Select the setID (if this field appears) and the role, customer, partner, partner contact, or person that you want to add to the membership list. Click the Add button to add new members.

Choosing the Dynamic Criteria for the Membership List

Access the Add Membership List (dynamic) page.

Add Membership List page

Select or enter the criteria that you want to use to create a membership list. The system uses the criteria that you select to create a dynamic membership list. To view the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

If a security object (for example, customer or partner) that returns in the search result has multiple addresses, the system displays all addresses as individual entries in the search result regardless of other search criteria. For example, if the object that returned is associated with two addresses, one in CA (California) and the other in NY (New York), you see both entries in the search result even if the search criteria indicate that only CA entries should be returned.

Adding View List Names and Descriptions

Access the View List page.

Add View List page

Enter a name for the view list that you want to create. Select the *Active* status. Enter text that describes the type of view list that you are creating.

Selecting View Objects and Options

Access the Add View List page.

Add View List page

Security Object   Select the security object that you want to use for your view list. Choose from one of these delivered values:

        • *Catalog*

- *Customer*

- *Hold Codes*

- *Performance Metric*

- *Financial Accounts*

Note. You can also create your own security object and select it from this list.

View Applies To   Select one of these values to indicate to whom you want the view list to apply:

- *All:* Select this value if you want the view list to apply to all members associated with the security object.

- *Multiple Members:* Select this value if you want the view list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add View List page, where you can select the view type that you want to use (either dynamic or static).

- *Single Member:* Select this value if you want the view list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either hold codes, catalogs, performance metrics, or customers.

Next   Click to go to the next page. The system displays a new page based on the selections that you made on the previous Add View List pages.

Selecting the View Type

Access the Add View List page.

Add View List page

View Type   Select one of these values:

- *Dynamic:* Select to define criteria for a dynamic list of members that you want included in your view list. When you click Next, a search page appears based on the security object that you selected on the second Add View List page.

- *Static:* Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add View List page.

Next   Click to go to the next page. The system displays a new page based on the
                                  selections that you made on the previous pages.

Adding Members to Static View List

Access the Add View List (static) page.

Add View List (static) page

This page displays different fields based on the security object that you selected on the previous page. Select
the setID (if this field appears) and the catalog, customer, hold code, or performance metric that you want
to add to the view list.

Choosing the Dynamic Criteria for the View List

Access the Add View List page.

Add View List page

Select or enter the criteria that you want to use to create a view list. The system uses the criteria that you select to create a dynamic view list. To see the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

Defining Functional Options

Access the Functional Option page.

Functional Option page (1 of 2)

Functional Option page (2 of 2)

Functional Option and **Description**	Enter a name for the functional option and then enter a description.
Revoke Wins	Conflicts may happen when a user is associated with multiple security profiles using functional options that conflict or when the same security profile has overrides for conflicting functional options. Select this check box if you want the system to not override the security for the functional option that you are creating when there are conflicts within or among different security profiles.

> **Note.** If one functional option group grants an option and another revokes it, the revoke takes precedence. If the Revoke Wins check boxes are not selected in the same scenario, the option is granted.

Related to Amount   Select to enable amount-related fields during the setup of functional option groups and specific functional options within the security profile.

Maximum Amount Wins   Select this check box to indicate that you want the maximum amount to win when there are functional options that conflict within or among different security profiles

Use Conditional Operator   Select to enable the conditional operator field during the setup of functional option groups and specific functional options within the security profile for amount-related fields.

Base Currency   Select the currency that is used most often for the functional option that you are creating.

Application Class ID,   Use these fields if you are writing PeopleCode programs required to evaluate
Application Class Path,   the functional option. Select the ID and path of the application class that the
and**Option Value Translate** system carries out when a user accesses the function or when the program
Field   runs. Also, you can specify a value translate field with values that will be
                               interpreted by the calling application to perform a specific functional action.
                               For example, the display template uses a translate field that makes the fields
                               display-only or changeable.

                               See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Message Set Number and   Select the message that you want the system to display if a user is denied
Denial Reason   access to the function.

Defining Functional Option Groups

Access the Functional Option Group page.

Functional Option Group page

Use functional option groups to group functional options. You may then associate the functional option groups with security profiles. Creating functional option groups and using them with security profiles can help make security maintenance faster and more efficient.

Functional Option Group and **Description**	Enter a name for the functional option group and then enter a description.

Functional Option Tab

Functional Option	Select the functional options that you want to include in the functional option group.
Option Value	Select the value that you want to use for the functional option. This field is available for entry only if a translate field was set up on the functional option.
Revoke	Select this check box if you want the system to override the security for the functional option when there are conflicts within or among different security profiles.

> **Note.** Revoke applies to the functional option only (for example, does a user have authorization to transfer money). If one functional option group says yes and another says no, the functional option that has the *Revoke Wins* check box selected wins and resolves the conflict.
>
> For transfer amounts, there is another type of conflict resolution called *Max Amount Wins.* In this situation, if one functional option group gives you access to 2000 USD and another gives you access to 3000 USD, the maximum amount wins and you have the authority to transfer up to 3000 USD.

Add Function Option	Click to add a new row in the functional option grid.

Amount Related Tab

The fields that appear on this page are used if the functional option is associated with an amount field.

Conditional Operator	Select the conditional operator (for example, equal to, less than, greater then, and so on) that you want to use for the functional option.
Amount	Enter the amount that you want associated with the conditional operator for the functional option.
Denial Reason	Select the reason that you want the system to display if the user is denied access to the transaction related to the functional option.
	For example, let's say you have given order capture representatives the ability to override prices. At some point in the season, you may want all of them to be denied from overriding prices on the items that you sell. You can go to the functional option group definition and set the Revoke Wins check box. From that point onward, the order capture representatives are denied from doing price overrides. You can set up similar situations for leads, opportunities, cases, and so on.

Adding Functional Option Groups and View Lists to the Security Profile

Access the Security Profile page.

Security Profile page (1 of 2)

Security Profile page (2 of 2)

Defining security profiles involves the granting of view lists and/or functional options. You then grant or associate one or multiple membership lists with the security profile. An enterprise administrator or enterprise channel manager should know how to create and maintain security profiles, as well as understand how security is impacted when a security profile changes.

Warning! Inactivating a security profile removes the associated membership and view lists

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Name and **Description**	Enter a name for the security profile and then enter a description.
Add Functional Option Group	Click to access the Functional Options Group page, where you can select the functional option groups that you want to include in the security profile. You can also use this page to view the functional options that are associated with the functional option group. The Enterprise Administrator who is assigning the Functional Option Groups must be aware of the groups that make sense for a given Membership list. Out of the box, all functional options and functional options groups that are delivered by PeopleSoft work with the 'Role' Security Membership Object. The only exception is the Financial Account Holders.
Add View List	Click to access the Add View List page, where you can select the view lists that you want to include in the security profile.
	Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Adding Membership Lists to the Security Profile

Access the Security Profile - Membership page.
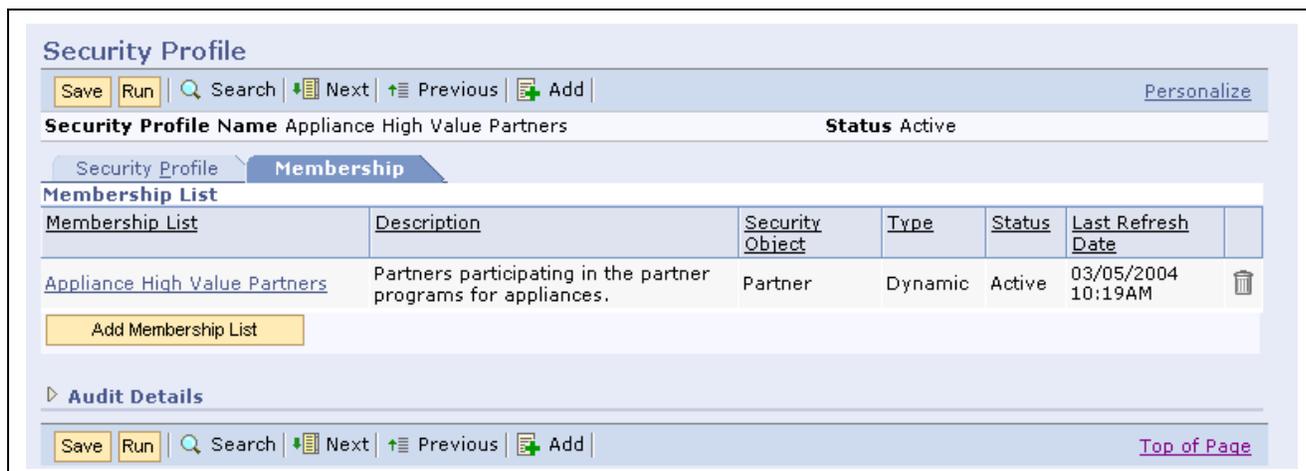
Security Profile - Membership page

Add Membership List	Click to access the Add Membership List page, where you can select the membership lists that you want to include in the security profile.
	Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Setting Run Controls for the List Build Process

Access the Refresh Dynamic Lists page.

Refresh Dynamic Lists page

Use this page to refresh the lists, security objects, and profiles that you have created to implement security for your PeopleSoft Enterprise CRM environment. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

Note. When a new user registers in Order Capture Self Service, they will not have immediate permission to view the product catalog. Application security needs to be triggered to get the appropriate product catalog access for the person who has just registered.

Process Type	Select one of these values based on the type of list that you want to refresh:
	• *Dynamic List Refresh.*
	• *New and Updated List Members.*
	• *Data Integrity.*
Process Scope	Select one of these lists or objects that you want to refresh:
	• *All Objects*
	• *Security Object*
	• *Security Profile*
	• *Membership List*
	• *View List*

Note. If you select *All Objects,* you do not need to specify the objects that you want to refresh. If you select any other value, you must use the field that corresponds to your selection to select a list, profile, or object name.

Entering Static Menu Transfer Paths

Access the Static Menu Transfer page.

Static Menu Transfer Path

Static List Navigation Source

Static List Navigation	Customer Static Member List
***Menu Name**	RSEC_SECURITY
***Menu Bar Name**	USE
***Item Name**	RSEC_ML_CUSTOMER
***Panel Item Name**	RSEC_ML_CUSTOMER

Audit Details

Date Created	12/16/2003	2:34PM PST	dmurphy3
Last Modified	12/16/2003	2:34PM PST	dmurphy3

Static Menu Transfer Path page

Use this page to create static menu transfer paths for entering or viewing static list data that is either dynamically created or manually entered. The static list navigations that you create on this page appear in the Static List Navigation drop-down list box on the Security Object page. Static list navigation is used when you create a security profile.

CHAPTER 5

Working with Notes and Attachments

This chapter provides an overview of notes and attachments and discusses how to:

• Set up note types.

• Create standard notes and product notes.

• Enter and view notes.

• Add attachments to notes.

Understanding Notes and Attachments

This section discusses:

• Notes in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).

• Attachments.

• Note types.

Notes in PeopleSoft Enterprise CRM

You can view and update notes in PeopleSoft Enterprise CRM in two ways:

1. The Notes List (RB_NOTES_LIST) component.

2. Notes pages on CRM components and transactions.

The Notes List Component

This component summarizes notes that are entered on commonly used PeopleSoft Enterprise CRM components: Lead, Opportunity, Order, Case, Customer, and Contact, and enables you to select a note and transfer to the Notes page in the component to view and update note details.

Notes Pages

All PeopleSoft Enterprise CRM components that can have notes attached to them use the same interface; however, the Notes page itself might vary slightly depending on the parent object. For example, case notes and order notes have a visibility field that determines whether self-service users can see the note when they look at the parent object. Other objects that are not accessible through self-service do not have this field.

Note Details

The note details view displays complete information for a single note, including a list of attachments that is associated with the note.

Notes Summary

The notes summary view lists all existing notes for the component.

Notes pages on some components include a summary notes list on the same page as the note details; for other components, the summary notes list is on a separate page. The summary notes list might also be part of a more general page.

Case notes can be associated with the case itself or with a resolution in the case. The notes summary view that is in the Case component displays both types of notes together. A resolution icon identifies notes that are part of a resolution.

Attachments

When you add an attachment to a note, you identify the file to attach. Once you identify the file, the system uploads the attachment to an attachment server. The attachment server stores attachment files, which ensures that the attachments are available to all users. You configure the system by using the Uniform Resource Locator (URL) Maintenance page to specify a URL for each component that supports attachments. This setup is part of the PeopleSoft Enterprise CRM installation process.

See the installation guides on the PeopleSoft Customer Connection website.

Files stored as attachments have two names. The original name of the file at the time it was uploaded is stored in the ATTACHUSERFILE field. A system-generated unique file name, stored in the ATTACHSYSFILENAME field, is the actual name of the file on the file server. The different objects that store attachments have different file-naming patterns for generating the ATTACHSYSFILENAME value, but all patterns are based on the ATTACHUSERFILE file name.

For example, system names for case attachments are formed by concatenating the case number, the letter *C,* the note sequence number, the letter *R,* the attachment sequence number, and the original file name. The following code represents this pattern:

```
CASE_ID||"C"||NOTE_SEQ_NBR||"R"||ATTACH_SEQ_NBR||ATTACHUSERFILE
```

Except in the Product component, attachments are associated with a note rather than associated with the note's parent object. When you click the link for an existing attachment, the system launches the attachment. If the attachment is an executable or batch program, the system runs the program. If the attachment is any other type of file, the system handles it according to the operating system's rules, either opening the file in a new browser window, prompting for a location to download the file, or offering a choice between these two actions.

Note Types

Most differences in the Notes page for different parent objects are self-explanatory. However, there is one hidden difference: the Note Type field that appears in some components derives its values from different places depending on the parent object.

This table lists the page where you define valid note types for objects that use note types:

Parent Object	Source of Valid Note Types
Business objects: Company, Consumer, Representative, and Site	Note Type page (BC_NOTETYPE_TBL), found under Set Up CRM, Common Definitions, Notes

Parent Object	Source of Valid Note Types
Case and Solution	Case and Solution Note Type page (RC_NOTETYPE), found under Set Up CRM, Common Definitions, Notes
Order/Quote, Services Management Order	Product Note Type page (NOTE_TYPE), found under Set Up CRM, Common Definitions, Notes
Campaign Detail	Translate (xlat) table.
Other objects	Notes for other objects do not include a Note Type field.

See Also

Setting Up Note Types

To set up note types, use the Note Types (RC_NOTETYPE) component.

This section lists the pages used to set up note types.

Pages Used to Set Up Note Types

Page Name	Object Name	Navigation	Usage
Note Type	BC_NOTETYPE_TBL	Set Up CRM, Common Definitions, Notes, CDM Note Type, Note Type	Set up note categorization codes that you can reference on the notes pages available in the Company, Partner Company, and Person components.
Case and Solution Note Type	RC_NOTETYPE	Set Up CRM, Common Definitions, Notes, Case and Solution Note Type, Case and Solution Note Type	Set up note types that you can reference on the notes pages available in the Case and Solution components.
Product Note Type	NOTE_TYPE	Set Up CRM, Common Definitions, Notes, Product Note Type, Product Note Type	Set up note types that you can reference on the notes pages available in the Product component.

Creating Standard Notes and Product Notes

This section discusses how to:

- Create standard notes.

- Create product notes.

Pages Used to Create Standard Notes and Product Notes

Page Name	Object Name	Navigation	Usage
Standard Notes	STD_NOTE	Set Up CRM, Common Definitions, Notes, Standard Notes, Standard Notes	Create a standard note.
Product Notes	PROD_NOTE	Product CRM, Product Notes, Product Notes	Create product notes.

Creating Standard Notes

Access the Standard Notes page.

Standard Notes page

Text   Enter up to 256 characters of text. You can modify the text, but you cannot have more than one entry.

Search Key Words   Enter keywords to select notes for reporting.

Print On Document   Not applicable to standard notes.

Creating Product Notes

Access the Product Notes page.

Product Notes page

| **Search Key Words** | Enter keywords to select notes for reporting. |
| **Print On Documents** | Not applicable for product notes. |

Entering and Viewing Notes

This section discusses how to:

• View lists of notes.

• Enter notes.

Note. Because Notes pages are always accessed within the context of a component (such as an order capture or campaign), navigational paths are not listed in this table. For the navigational path, refer to the component documentation.

Pages Used to View and Enter Notes

Page Name	Object Name	Navigation	Usage
Notes List - Lead Notes	RB_NOTES_LIST_LEAD	Customers CRM, Notes List, Lead Notes	View a list of lead notes and access note details.
Notes List - Opportunity Notes	RB_NOTES_LIST_OPP	Customers CRM, Notes List, Opportunity Notes	View a list of opportunity notes and access note details.
Notes List - Case Notes	RB_NOTES_LIST_CASE	Customers CRM, Notes List, Case Notes	View a list of case notes and access note details.
Notes List - Customer Notes	RB_NOTES_LIST_CUST	Customers CRM, Notes List, Customer Notes	View a list of customer notes and access note details.
Notes List - Site Notes	RB_NOTES_LIST_SITE	Customers CRM, Notes List, Site Notes	View a list of site notes and access note details.
Notes List - Contact Notes	RB_NOTES_LIST_PRSN	Customers CRM, Notes List, Contact Notes	View a list of contact notes and access note details.
Notes List - Consumer Notes	RB_NOTES_LIST_CONS	Customers CRM, Notes List, Consumer Notes	View a list of consumer notes and access note details.
Notes	PROD_ATT, RA_CAMPAIGN_NOTES, RA_CONTENT_NOTE, RA_LIST_NOTE, RA_OFFER_NOTE, RB_EMAIL_NOTE, RC_CASE_NOTE, RC_CASE_RSLN_NOTE, RC_SOLN_NOTES, RD_NOTES, RE_NOTES, RE_NOTE_SUMMARY, RF_RMA_NOTE, RO_NOTE, RF_SERVICE_NOTE2, RF_SO_NOTE2, RF_SO_RSLN_NOTE, RQ_DEFECT_NOTES, RG_CHANGE_NOTE, RSF_LEAD_NOTES, RSF_OPP_NOTES	Varies by component: refer to the documentation for the parent component.	Create or update notes and add attachments.

Viewing Lists of Notes

Access the Notes List page for a lead, opportunity, customer, contact, or consumer.

Notes List - Customer Notes page: Note Details tab

Note Details

Select the Note Details tab.

Click the View Detail button to access the component for the listed lead, opportunity, customer, contact, or consumer. You can access the Notes page for the component to view notes.

Note. When you click this button, the Lead, Opportunity, Company, or Person component and the associated notes page appear in a new browser window.

Note Summary

Select the Note Summary tab.

Notes List - Contact Notes page: Note Summary tab

The contact name and note summary appear in this page region.

Entering Notes

Access the Notes page.

Note. This screen shot is from the Case component. It is typical of Notes pages throughout PeopleSoft Enterprise CRM.

Notes page

Notes Summary

A summary of existing notes for the component appears in this page region. If there are attachments for the note, the number of attachments appears in the Attachments column.

Note Details

If no notes exist for the component, this page region is titled Add Note. and contains only an Add Note button.

Subject	Enter a short summary of the note. If you do not enter a value, the system enters the first fifty characters of the Details field into this field when you save the note.
Note Type	Select a classification for the note. Values are defined differently depending on the parent object. This functionality is not available in all components.
	See Chapter 5, "Working with Notes and Attachments," Note Types, page 116.
Details	Enter the full text of the note.
Apply Note	Click to update the Notes Summary list with the note that you entered.
	Note. Click the Apply Note button to add the note to the Notes Summary grid. The note is not saved to the component until you save the component.
Add an Attachment	Click to add an attachment to the note.

Adding Attachments to Notes

This section discusses how to add attachments to notes.

Selecting a File to Add as an Attachment

To add an attachment to a note:

1. Access the Notes page for the object to which you are adding an attachment.

   Note. Normally you add attachments to notes. In the Product component, however, you add attachments directly to the product.

2. Click the Add an Attachment button.

   Enter the full path (including the file name) of the file to attach.

3. In the dialog box that appears, enter the full path name of the file to attach, or browse to the file.

4. Click the Upload button.

   The system uploads the specified file to the server that is configured to store all of the PeopleSoft Enterprise CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the Notes page again. If the upload was successful, the file appears on the page.

5. Add descriptive information about the file.

   If the parent object is a note, you can also use the note to record a longer comment about the attachment.

6. Save the component.

CHAPTER 6

Using Interactive Reports

This chapter provides overviews of interactive reports and delivered system data for interactive report and discusses how to launch interactive reports.

Understanding Interactive Reports

This section discusses:

- Interactive reports and the Analytic Calculation Engine.
- Delivered report and query definitions.

Interactive Reports

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) interactive reports are based on the PeopleSoft business analysis modeler tool Analytic Calculation Engine (ACE).

Use the interactive reports to view transactional data in multidimensional online reports. For example, a PeopleSoft Call Center business analysis modeler report might have two dimensions: customer and product. This enables users to display the number of cases in four ways—customer, product, customer within product, or product within customer.

Interactive reports can have more than two dimensions, which enable users to organize data in a variety of ways that serve various business purposes. Users drag and drop the available dimensions to reconfigure the report view as they use it. For example, in viewing a call center report, a user might add another available dimension such as *month* as a third dimension.

Users can filter interactive report data by selecting a single value for any dimension. For example, a user can limit a report so that only cases for one customer, organized by product and then by month, appear. This filtering capability provides the user with an overview of the products that are giving the customer trouble, as well as whether the number of cases that are reported against each product is decreasing or increasing.

Access to an Interactive Report is controlled by user roles. The user can export report data to Microsoft Excel or printed a hard copy. While you can interact with these reports by modifying data and moving data elements (dimensions) on the reports, the communication between the report and PeopleSoft Enterprise CRM is one-way—changes you make to interactive report data are local only, and do not affect the original source data in the PeopleSoft Enterprise CRM database. Also, you cannot transfer from an interactive report to any PeopleSoft Enterprise CRM components in order to access data.

PeopleSoft ACE is a PeopleTools product. For information on installing and setting up interactive reports using ACE, see the following references listed.

See Also

https://www.peoplesoft.com/corp/en/login.jsp

Delivered Report and Query Definitions

PeopleSoft Enterprise CRM provides these interactive report definitions:

Report Description	Application
Campaign Performance/ Forecast	Marketing
Helpdesk SLM Analysis	Support
Support Case Analytics	Support
Support SLM Analysis	Field Service
FieldService Dashboard	Field Service
Service Order Aging Analysis	Field Service
Utilization Rate Analysis	Field Service
Change Request Metrics	Help Desk
Forward Schedule of Changes	Help Desk
Enterprise Order Metrics	Order Capture
Enterprise Order Revenue	Order Capture
Sales Compare of Forecasts	Sales
Sales Activity Forecasts	Sales
Telemarketing Lead Acceptance	Telemarketing
Telemarketing Lead Quality	Telemarketing
Telemarketing Sales Conv Rate	Telemarketing
Telemarketing Sales Quality	Telemarketing
Dialog Performance Report	Online Marketing

Each report has an accompanying query definition that is similarly named to the report definition.

Launching Interactive Reports

Each PeopleSoft Enterprise CRM application that delivers an interactive report provides documentation for viewing that specific report.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "PeopleSoft Call Center Interactive Reports"

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Working with Interactive Reports for Order Capture"

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "Using Interactive Reports in PeopleSoft Marketing Applications"

PeopleSoft Enterprise Sales 9 PeopleBook, "Understanding Sales Interactive Reports"

CHAPTER 7

Setting Up Currencies

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

• Set up currencies.

• Calculate currency exchange.

Understanding Currencies

This section discusses:

• Currency management in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).

• Direct and indirect rate quotations.

• Triangulation.

• Automatic reciprocation of quote methods.

Currency Management in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM enables you to manage financial information in multiple currencies and perform currency conversions. The Currency Code table that PeopleSoft Enterprise CRM delivers defines many common currencies that are identified by the International Standards Organization (ISO) standard, including the European common currency (euro). You can update the currency definitions on this table or enter new ones.

Note. The Currency Code table supports the ISO standard of zero, two, and three decimal positions.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation to provide you with flexible tools to convert and manage multicurrency operations. The currency quotation method controls how a stored rate appears and how an entered rate is interpreted and stored in the database.

You can set up a currency quotation method for each from and to pair of currencies that you use. Define currency quotation options before entering and calculating rates.

Direct and Indirect Rate Quotations

An exchange rate is the price of one currency, such as the British pound, in terms of another currency, such as the U.S. dollar. Exchange rates are quoted directly or indirectly. Most countries use the direct method. With this method, the exchange rate indicates how much of the local currency is exchanged for one unit of the foreign currency. For example, suppose that one has to pay .6326 pounds to obtain one dollar, the direct quotation is 1 USD = .6326 GBP.

With the indirect method the exchange rate is expressed as the amount of foreign currency that is required to purchase one unit of the domestic currency. In the preceding example, the indirect quotation is 1 GBP = 1.5814 USD.

Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a reference currency—a stronger, more stable currency, such as the U.S. dollar.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR (Structured Query Report) uses these three exchange rates:

• The rate between the from and reference currencies.

• The rate between the reference and to currencies.

• The cross rate between the from and to currencies.

Typically, you do not maintain these rates directly.

Set up the currency quotation methods correctly to yield the correct results for triangulation. Two fields store the rate conversion factor: RATE_DIV and RATE_MULT. With these in mind, the currency conversion formula is always (From currency / RATE_DIV) * RATE_MULT = To currency.

For example, converting from the Russian rouble (RUR) to the Brazilian real (BRL) through the U.S. dollar (USD) is a two-step conversion. First, the RUR is converted to the USD using the appropriate triangulated rate (which uses the RUR to USD component of the triangulated rate that is stored in RATE_DIV). Second, the USD is converted to the real by using the fixed exchange rate (which uses the USD to BRL component of the triangulated rate that is stored in RATE_MULT).

It was a legal requirement to use triangulation to convert currencies participating in the euro prior to January 1, 2002. Even after an enterprise has switched over to the euro, it is necessary to keep historical data available in the national currency unit in order to maintain an audit trail. In most countries, national law requires enterprises to keep accounting records in their original form for at least 5 to 10 years. This is important to avoid synchronization problems between the legacy and the converted systems. For example, representing amounts dated before the euro came into existence in euro could cause anomalies when comparing data that was collected during the floating-rate era before January 1, 1999.

Conversion of historical data requires that you convert all instances of the same data in exactly the same way. This can cause rounding differences with non-normalized data, as is commonly the case in data warehouses that support management information systems (MIS) or decision support systems (DSS). Each organization must decide how significant such differences are in the context of the data use, which might be merely for internal trend analysis.

Automatic Reciprocation of Quote Methods

The Currency Quotation Method page automatically reciprocates itself. For example, if you define the conversion of USD to GBP as indirect, the system automatically creates this record to indicate a quote method of direct. If you change the quote method on the GBP to USD record, the system automatically updates the USD to GBP record.

This table lists each possible value with its reciprocal value:

Page Element	Value (for RUR to BRL)	Reciprocal Value (for BRL to RUR)
Rate Quotation Basis	Direct Indirect	Indirect Direct
Quote Units	Any value	Same value
Rate Decimal Positions	4 (default value)	Same value
Auto Reciprocate	Yes No	Yes No
Triangulate	Yes No	Yes No
Reference Currency	Any value	Same value
Primary Visual Rate	From - To (RUR - BRL) From - Reference (RUR - USD) Reference - To (USD - BRL)	From - To (BRL - RUR) Reference - To (USD - RUR) From - Reference (BRL - USD)
Cross-Rate Allow Override	Yes No	Yes No
Cross-Rate Recalculate	From - Reference (RUR - USD) Reference - To (USD - BRL)	Reference - To (USD - RUR) From - Reference (BRL - USD)

Setting Up Currencies

To set up currencies, use the Currency Code (CURR_CD_TABLE) and Currency Quotation Method (CURR_QUOTE_PNL) components.

This section discusses setting up currencies in PeopleSoft Enterprise CRM.

Pages Used to Set Up Currencies

Page Name	Object Name	Navigation	Usage
Currency Code	CURRENCY_CD_TABLE	Set Up CRM, Common Definitions, Currency, Currency Code, Currency Code	Add or update a currency code.
Currency Quotation Method	CURR_QUOTE_PNL	Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method	Set up and maintain a currency quotation method for each from currency and to currency pair.

Adding or Updating Currency Codes

Access the Currency Code page.

Currency Code page

Currency Symbol   Enter a currency symbol. You can change the currency symbol that is delivered with the application or enter new symbols for currencies.

Scale Positions   Enter the number of numerals that you want to appear to the left of the decimal. The system rounds numbers accordingly for display, although it actually stores data with full precision in the database.

For example, suppose that you want all million dollar amounts to appear as the number of millions without the zeros, enter *6* as the scale position. In this case, 24,000,000 appears as 24, but it is stored in the database as 24,000,000.

Setting Up the Currency Quotation Method

Access the Currency Quotation Method page.

Currency Quotation Method page

Rate Quotation Basis

Direct	Select if you want direct quotes for currency pairs. For example, for a conversion of dollars to euros, a direct quote indicates that 1 USD = x.xxxx EUR. **Note.** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.
Indirect	Select if you want indirect quotes for currency pairs. For example, for a conversion of dollars to euros, an indirect quote indicates that x.xxxx USD = 1 EUR. **Note.** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.
Quote Units	Enter any value in this field, although quote units generally have a scale of 10 (such as 10, 100, 1000). The default value for this field is *1*. Quote units, sometimes called scaling factors, are used to preserve decimal position. For example, you might state the exchange rate between roubles and dollars as 1000 RUR = 31.4169 USD instead of 1 RUR = 0.031469 USD.
Auto Reciprocate	Select to have the system automatically create or update the rate for the reciprocal currency pair whenever an exchange rate is added or updated. For

example, when you enter a new USD to GBP rate, the GBP to USD rate is updated automatically. You can only automatically reciprocate currency pairs for which quotation methods are established. The check box is selected by default.

Triangulation Options

Use the Triangulation Options group box to set up triangulation between currencies.

Triangulate   Select to convert two currencies through a third currency (the reference currency).

Reference Currency   Enter the currency through which the from currency is converted. For example, when the system converts between Russian roubles and Brazilian reals, the reference currency might be the United States dollar.

Primary Visual Rate   Select the primary rate. The primary rate appears on primary pages and reports.

Allow Override   Select to enable users to override the cross rate for a triangulated currency pair. If this check box is cleared, users can only change the components of the triangulated rate. If you select this check box, you must specify which currency pair the system uses to recalculate to keep the triangulation accurate.

Recalculate   Select the method for recalculation.

Calculating Currency Exchange

This section discusses how to calculate currency exchange.

Page Used to Calculate Currency Exchange

Page Name	Object Name	Navigation	Usage
Currency Exchange Calculator	CURRENCY_EXCHNG_PN	Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator	Calculate the currency exchange between currencies.

Calculating Currency Exchange

Access the Currency Exchange Calculator page.

Currency Exchange Calculator page

Effective Date   Enter the date of the currency conversion. The system uses the rate that is
                                   effective on the date that you enter.

CHAPTER 8

Setting Up Credit Card Encryption

This chapter provides an overview of credit card encryption and discusses how to:

• Implement credit card encryption.

• Secure the credit card components.

• Change the credit card encryption key.

• Synchronize re-encrypted data with PeopleSoft Enterprise Financials.

Understanding Credit Card Encryption

PeopleTools Pluggable Cryptography is an advanced security framework that introduces a new security model for applications to encrypt and decrypt credit card data. This feature adds greater security to the credit card data handling system as well as upgrades existing credit card data.

Credit card encryption is available to PeopleSoft Enterprise CRM implementations that are integrated with PeopleSoft Enterprise Financials.

Strong Encryption

Pluggable Cryptography protects critical PeopleSoft data and enables more secure data communication with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools. By incrementally acquiring stronger and more diverse algorithms for encrypting data, Pluggable Cryptography offers strong cryptography with the flexibility to change and grow.

Enhanced cryptography capability is provided by PeopleSoft pluggable encryption technology (PET), which employs 3DES algorithms and 168-bit encryption keys to secure data.

Features

Applying Pluggable Cryptography to your system:

• Improves the system's ability to protect credit card data during transfer and storage.

• Upgrades existing credit card data.

• Protects data during information display.

Once upgraded, the system displays credit card numbers so as to mask them. Before upgrade, the system displayed all digits of a credit card number, whether display-only or editable. The feature modifies the display to show only the last four digits, replacing each preceding digit with an X.

Standards

PeopleTools Pluggable Cryptography complies with the cardholder data protection requirements of the Payment Card Industry (PCI) Data Security Standard and with Visa's Cardholder Information Security Program (CISP). When you enable this feature, credit card numbers for external third-party payers, such as customers or students, are encrypted.

Note. This feature upgrades credit card numbers that are shared with the PeopleSoft Financials or a third-party database; it does not upgrade those stored internally in the CRM database, such as company-owned or employee credit cards.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "Securing Data with Pluggable Cryptography"

Implementing Credit Card Encryption

You must perform these tasks to implement the new functionality:

1. Make sure that the PeopleSoft Financials database that you integrate with is set up to support credit card encryption.

2. Secure the credit card component.

   See Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 139.

3. Upgrade existing credit card data.

   See *PeopleSoft Enterprise Customer Relationship Management Upgrade,* "Complete Database Changes," Encrypting Credit Card Data

   Contact Global Support before attempting to upgrade your data, if you have customized your system in any of the following ways:

   • Added any records containing credit card number fields.

   • Added a credit card number field to any records.

   • Deleted any records found in the grid on the Upgrade Credit Card Numbers component.

   • Deleted a credit card number field from any records found in the grid on the Upgrade Credit Card Numbers component.

   • Customized the credit card encryption processing functionality in any way.

   • Changed whether or how any particular credit card field is encrypted.

4. Change the credit card encryption key.

   See Chapter 8, "Setting Up Credit Card Encryption," Changing the Credit Card Encryption Key, page 141.

Securing the Credit Card Component

You must specify the user roles that have access to credit card components.

Securing the components involves these general steps:

1. Add the Credit Card Component menu (CCENCRYPTION_MENU) to the appropriate permission list.

   See Chapter 8, "Setting Up Credit Card Encryption," Adding CCENCRYPTION_MENU to a Permission List, page 139.

2. Provide security for the new credit card components:

   See Chapter 8, "Setting Up Credit Card Encryption," Providing Security for Credit Card Components, page 139.

   • FS_CC_UPGRADE

   • FS_CC_CNVRT

3. Provide security to the new portal registries:

   See Chapter 8, "Setting Up Credit Card Encryption," Providing Security for the Portal Registries, page 140.

   • CREDIT_CARD_ENCRYPTION (Credit Card Encryption folder)

   • FS_CC_UPGRADE_GBL (Upgrade Credit Card Numbers content registry)

   • FS_CC_CNVRT_GBL (Change Encryption Key content registry)

4. (Optional) Change the security group for the FS_CC_CNVRT Application Engine process definition.

   See Chapter 8, "Setting Up Credit Card Encryption," Changing the Security Group (Optional), page 140.

5. Run the portal security synchronization process (PeopleTools, Portal, Portal Security Sync).

6. Clear the application and web server caches.

Adding CCENCRYPTION_MENU to a Permission List

You must add CCENCRYPTION_MENU to the appropriate permission list. You may want to choose a security administration role.

See Also

PeopleSoft Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists," Managing Permission Lists

Providing Security for Credit Card Components

To provide access to the new PeopleSoft components:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists, Pages.

2. Add the menu name CCENCRYPTION_MENU.

3. Click Edit Components.

   The Components page appears.

4. Locate the FS_CC_UPGRADE component to which you want to grant access.

   (By default, no components are authorized when adding a menu.)

5. Click the Edit Pages button for each component to which you want to grant access.

   The Page Permissions page appears.

6. Specify the actions that a user can complete on the page.

7. Click OK on the Page Permissions page, and then again on the Component Permissions page.

Note. Perform this procedure twice, once for the FS_CC_UPGRADE component and again for the FS_CC_CNVRT component.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"

Providing Security for the Portal Registries

You must provide security for the new folder and content registries on the portal.

For *Folder:*

1. Navigate to PeopleTools, Portal, Structure and Content.

2. In the Folders list, click on the links Set Up CRM, then Utilities.

3. Click the Edit link next to the Credit Card Encryption folder name.

4. Click the Folder Security tab.

5. On the Folder Administration page, select the permission lists that you want to have access to the Credit Card Encryption menu.

For *Content Registries:*

1. Navigate to PeopleTools, Portal, Structure and Content.

2. In the Folders list, click on the links Set Up CRM, then Utilities, then Credit Card Encryption.

3. Click the Edit link for Upgrade Credit Card Numbers (FS_CC_UPGRADE_GBL).

4. On the Security tab, make sure the permission list displayed corresponds to the CCENCRYPTION_MENU permission list.

5. Repeat steps 3 and 4 for Change Encryption Key (FS_CC_CNVRT_GBL).

Note. When you complete all security tasks, delete your browser cache so that you can view the new portal registries in the menu navigation.

See Also

Enterprise PeopleTools PeopleBook: Internet Technology, "Administering Portals"

Changing the Security Group (Optional)

You can optionally change the security group for the FS_CC_CNVRT Application Engine process definition.

To change the security group:

- Navigate to PeopleTools, Process Scheduler, Processes.
- Select *Process Name* in the Search By field.
- Enter *FS_CC_CNVRT* in the begins with field.
- Click the Search button.
- On the Process Definition page, select the Process Definition Options tab.
- Modify the security group in the Process Groups grid.

Changing the Credit Card Encryption Key

This section describes how to:

- Re-encrypt credit card data.
- Change the encryption key.

You can change the credit card encryption key at any time.

Page Used to Change the Encryption Key

Page Name	Object Name	Navigation	Usage
Credit Card Number Re-Encrypt	FS_CC_CNVRT	Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key	Change the key used to encrypt credit card numbers. Run the utility to re-encrypt credit card numbers using a new encryption key.

Re-Encrypting Credit Card Data

To change the encryption key at any time after the initial conversion, you must first re-encrypt all credit card data.

To re-encrypt credit card data:

1. If this is the first re-encryption following the initial conversion and you have not secured the FS_CC_CNVRT component, complete the steps in the "Securing the Credit Card Components" section in this chapter.

   See Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 139.

   Complete the steps for the FS_CC_CNVRT component only. Securing FS_CC_CNVRT secures both the FS_CC_CNVRT component and the FS_CC_CNVRT portal registry.

2. Navigate to Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key.

3. Click the *Generate Random Key* button to generate a new random hexadecimal encryption key.

   Clicking this button generates a new, random hexadecimal encryption key. You can modify this key, but you must format it as a 24-byte string in hexadecimal notation. The first two characters must be *0x,* and the remainder must be exactly 48 characters and consist of both numeric digits and the lowercase letters *a* through *f.*

4. If the values in the Re-encrypt Action column are not *Decrypt, then Encrypt,* click the Crypt Action button until *Decrypt, then Encrypt* appears in the column.

5. Click the Run button to start the conversion process.

   The Credit Card Conversion process converts each field in the grid. If the process fails for any reason, you can restart the process; it will resume where it stopped. If you can not restart the process, run it from the beginning. The system will bypass fields that have already been processed.

Changing the Encryption Key

Access the Credit Card Number Re-Encrypt page.

Credit Card Number Re-Encrypt page

Crypt Action	Toggle the value in the Re-Encrypt Action column in the grid.
Generate Random Key	Generate a random key in the format needed by the encryption algorithms used for credit card encryption and decryption profiles.
(Encryption key)	If you want to modify the generated key or enter your own, you must format it as a 24-byte hex string. The first two characters must be *0x* and the remainder must be exactly 48 characters that consist of both numeric digits and the lowercase letters *a* through *f.*
Record (Table) Name	Displays the record name.

Field Name	Displays the field name.
Re-Encrypt Action	Values include:

- *Decrypt, then Encrypt:* Re-encrypt data currently encrypted with the Pluggable Cryptography credit card encryption profile.

- *No Action:* Indicates that the utility has converted the record. If an error occurs and you rerun the process, records for which No Action is displayed are not reprocessed.

Synchronizing Re-Encrypted Data With PeopleSoft Enterprise Financials

Any change in CRM data requires that it be propagated to the PeopleSoft Financials database, which is described in the PeopleSoft PeopleBooks for your software release. Recommended references follow.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook, "Activating Messaging EIPs"

PeopleSoft Enterprise Components for CRM 9 PeopleBook, "Performing a Full Data Publish of Current Effective Data"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Data Integrations

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Integrating with PeopleSoft Applications," Integrating with PeopleSoft Financial Management Services

CHAPTER 9

Implementing Alternate Character

This chapter provides an overview of alternate character and discusses how to configure the system for alternate character usage.

Understanding Alternate Character

This section discusses:

- Alternate character functionality.
- Alternate character display.
- Alternate character searches.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Person Business Objects"

Alternate Character Functionality

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) provides alternate character functionality that supports the need in Japanese and Cantonese (Hong Kong) markets to represent proper nouns phonetically and in their native formats. This functionality enables PeopleSoft Enterprise CRM to validate double-byte characters in alternate character fields.

To implement alternate character functionality, you must have installed a Japanese- or Cantonese-enabled database and a double-byte-enabled operating system. The alternate character architecture and the related language table architecture enable users to enter data using both single-byte and double-byte character sets and to switch between a base language table and a related language table to view information in either single-byte or double-byte characters.

For example, users who enter data in Japanese require functionality that enables them to enter proper nouns, such as names or addresses, both in kanji and by using a phonetic double-byte character set, such as hiragana. The alternate character architecture also supports phonetic sorting rather than binary sorting on proper nouns for languages that require the use of two-character sets to enter proper nouns.

Alternate Character Fields

In an alternate character-enabled system, alternate character fields appear in company and person names and addresses.

Labels for alternate character fields differ depending on the component and the field. For example, the Alt Char Name appears in the Company component for entry of the company name in alternate character format. The rules that the system used to determine if alternate character fields appear on pages vary depending on the type of alternate character information that you enter:

- Company name.

  In an alternate character-enabled system, the alternate character field for a company name always appears, whether or not it has a value. This does not depend on the country setting for the company.

- Person name.

  The alternate character field appears on a page only if the country format is Japan or Hong Kong. You cannot view the alternate character field if one of these countries is not selected.

  Pages that display personal name fields usually display them in first name, last name order. For Japanese and most Southeast Asian languages, however, personal name fields appear in the last name, first name order. A space, not a comma, separates the last and first names—the Name field displays the last name[space]first name, not last name,first name.

- Address (for both companies and persons).

  The alternate character fields appear on the Update Address, the Address Book Entry Details and the Quick Create pages. They do not appear on the Address Book list page or on the summary address information that appears on the primary page for a business object.

  See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Name and Address Information for Business Objects".

Note. The alternate character display is determined by the country code that is specified for the business object, not by the country code that is defined as a user preference for the user.

Alternate Character Searches

After you establish alternate character information, you can use the alternate character fields as search criteria in the Business Object search component or the Configurable search.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Working with Predefined Business Object Search and Quick Create Data".

Configuring the System for Alternate Character Usage

This section discusses how to:

- Set up alternate characters for language codes.

- Enable alternate character functionality for a user.

- Enable business object search to recognize alternate character fields.

Pages Used to Configure the System for Alternate Character Usage

Page Name	Object Name	Navigation	Usage
Installation Options - Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, User Preferences, Overall Preferences	Enable alternate character functionality for a user.
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customers, BO Search, Field, Field	Enable business object searches and quick creates to use alternate characters for a specific field.

Setting Up Alternate Characters for Language Codes

Access the Installation Options - Alt Character (alternate character) page.

Installation Options - Alt Character page

Language Code   Select a language code to which you can assign an alternate character value.

Alternate Character   Select the character set for the language code. Values are: *Alphanumeric, Alphanumeric with Latin-1 Ext, Any, DB Any Characters (Kanji), Double Byte Hiragana, Double-Byte Katakana,* and *Single Byte Katakana.* The system uses the character set that is assigned to a user's language code to display alternate character-enabled fields to the user.

Enabling Alternate Character Functionality for a User

Access the User Preferences - Overall Preferences page.

See Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 77.

Enabling Business Object Search to Recognize Alternate Character Fields

Access the Field page.

Select the Is Alternate Character Field field.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions.

CHAPTER 10

Setting Up Auditing for Cases and Inbound Email

This chapter provides an overview of audit information and discusses how to set up case auditing.

Important! PeopleSoft delivers the system with auditing features disabled. Because enabling auditing can negatively impact application performance, you should analyze audit needs carefully and enable auditing only when there is a strong business reason to do so.

Understanding Audit Information

This section discusses:

• History versus auditing.

• The audit record.

History Versus Auditing

PeopleSoft Enterprise CRM tracks events that occur in cases and emails using a feature called the Active Analytics Framework. You can view a summary of these tracked events on component history pages. For each tracked event, a corresponding audit trail record stores details of changes and is used to display details of the changes.

Use the following pages to review history information in the Case component and in the Inbound Email component:

• Case History page

The Case History page lists information about major events in the life of the case, including a description of the event and details of field changes that are associated with the event. You can define case history events using complex conditional statements. For example, you can configure the case history so that changes to a field only appear if the field changes to or from a particular value.

You set up case history processing using the active analytic framework.

• Email History page

The Email History page lists email history events that are captured by the active analytic framework. You can use this page to review email event history, routing history, and audit trail information.

Both history pages offer access to a detailed audit trail page that displays record-level changes. You can specify the fields in the record to audit and the types of changes to capture (add, update, display, or delete). You cannot incorporate logic based on the value of the fields; the system captures changes without regard to the data that changes.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Processing Cases," Reviewing Case History

PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook, "Setting Up ERMS System"

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

The Audit Record

The audit record stores audit trail data. The structure of this record determines the fields that get audited. The audit record for the Case component, RC_CASE_AUDIT, stores information from both support cases and help desk cases. The RB_INEM_AUDIT record stores information for the Search Inbound Emails component (the email workspace).

The audit record consists of these elements:

1. Audit record key fields.

   These fields hold information that is specific to the audit action.

2. The key fields for the records to audit.

   These are alternate key fields in the audit record.

   Cases are based on several records; the audit record includes the key fields for every record that is audited. The BUSINESS_UNIT key field, however, is not on the audit record even though BUSINESS_UNIT is a key to the main case record, RC_CASE, and to each of its child records. This is because case numbers are unique across all business units, and the value in the CASE_ID field is enough to uniquely identify the case.

3. The fields to audit.

   If a field appears in more than one record, changes to both records are audited. For example, the RC_DECSRLONG field appears in both RC_CASE and RC_CASE_NOTE. By including this field in the audit record, you ensure that changes to both the case description and the note description are audited.

This is the audit record architecture for RC_CASE_AUDIT:
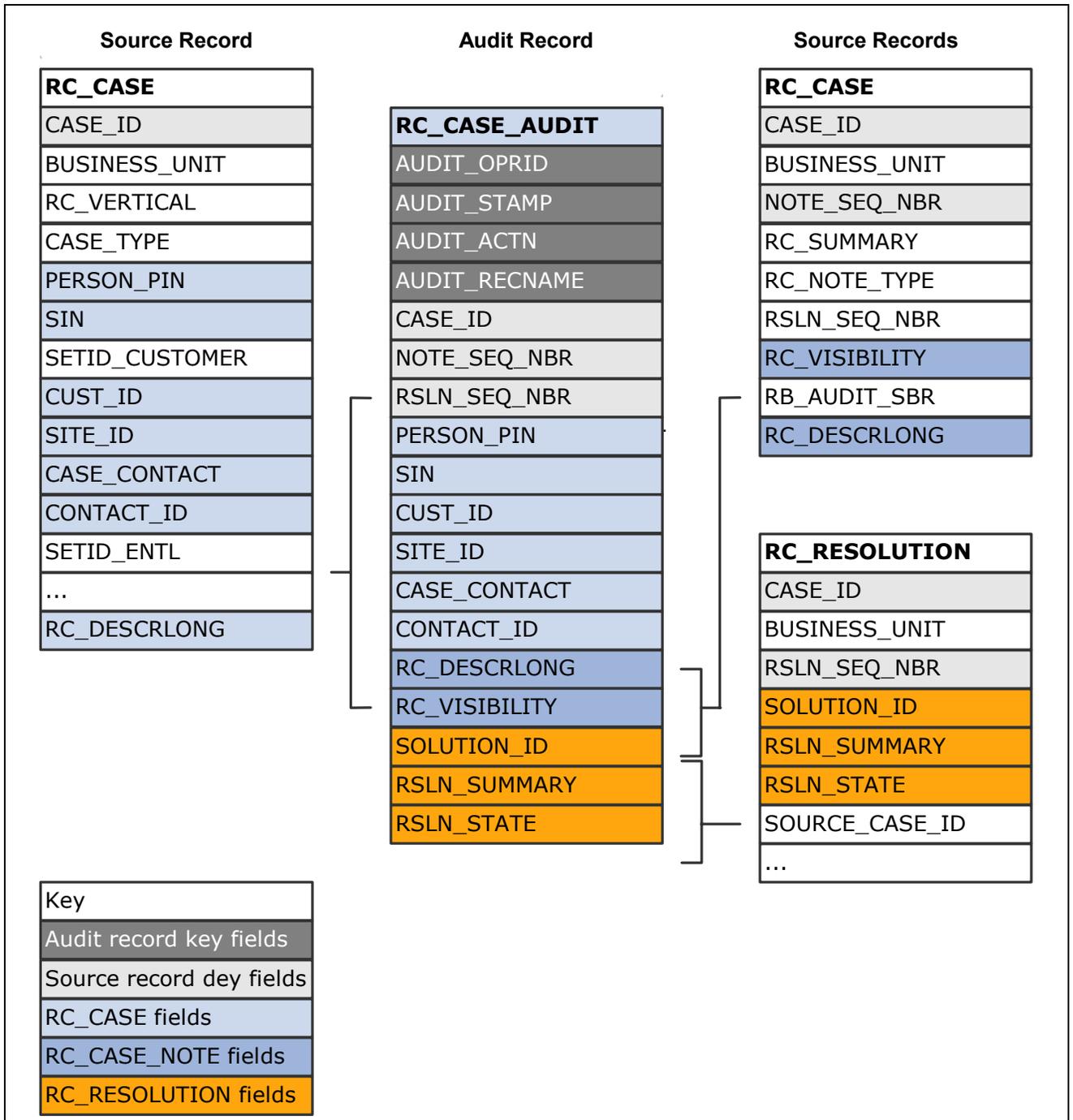
Partial case audit record

The left and right columns list the records that are audited, or *source records.* The middle column lists the audit record.

Note. This diagram is an example only. Use PeopleSoft Application Designer to review the actual record structures for cases.

Before you turn on auditing, review the record structure so that you know which fields get audited.

To change the fields that get audited, use PeopleSoft Application Designer to modify the RC_CASE_AUDIT record definition or the RB_INEM_AUDIT record definition.

Important! PeopleSoft does not support modifications to the audit record definitions.

Setting Up Case and Email Auditing

To choose actions to audit, use the Audit - Setup (RC_COMP_AUDIT) component.

This section discusses how to set up case auditing.

Page Used to Set Up Case Auditing

Page Name	Object Name	Navigation	Usage
Audit - Setup	RC_COMP_AUDIT	Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup	Choose which actions (add, change, and delete) to audit.

Choosing Actions to Audit

Access the Audit - Setup page.

Audit - Setup page

Component Name   Enter the object name of the component. PeopleSoft delivers entries for RC_CASE (the Case component) and RB_EM_IB (Search Inbound Emails component).

Although you configure auditing at the component level, the processing occurs at the record level. Therefore, when multiple components are based on the same record, the system captures data changes regardless of which component the user was in when making the change. For example, the auditing that you establish for the RC_CASE component is also valid for the self-service case components, which are based on the same records.

Audit Record Name   Enter the record where the system stores information about data changes. The structure of this record determines which fields get audited.

Record - Audit Options

The fields in the Record - Audit Options region enable you to select which actions (add, change, and delete) to capture for each record that you audit. The selections apply to all audited fields in the specified record. You cannot set any field-level auditing options; all fields in a record must use the same auditing rules. To set field-level auditing options, you must redefine the audit record using PeopleSoft Application Designer.

When you activate auditing on the Audit Setup page, you turn on auditing only for the fields that are included in the audit record (RC_CASE_AUDIT or RB_INEM_AUDIT—the record that stores the audit trail data.

All auditing is based on differences between the field values at the time that the component is opened and at the time that the component is saved. If a user saves several times while working in a component, each save triggers auditing activity.

Record (Table) Name   Enter the record that is associated with the audited component. For example, the Case component includes data from several records.

Add   Select to have the system capture the change every time a value is added to a field that is audited. A value is considered as added in two situations:

• When data is in the field the first time that you save a new row of data.

  For example, if you create a new case, the values in all populated fields are considered as added the first that time that you save that case.

• When you save data in a field that was previously null.

Change   Select to have the system capture the change every time the value of an audited field is updated. A value is considered updated when a new non-null value is different from the previous non-null value.

Delete   Select to have the system capture the change every time the value of an audited field is deleted. A value is considered deleted when a null value replaces a non-null value.

Show Field Label   Select to have the runtime audit page display the field labels rather than the field's object name. For example, if you're auditing the RC_PRIORITY field, selecting this option causes the audit page to refer to this field as *Priority* rather than *RC_PRIORITY.*

If this check box is clear, the audit page displays field values. If the audited field has translate values, the translate long value appears.

CHAPTER 11

Running Diagnostic Reports

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) diagnostics and discusses how to:

• Register diagnostic packages.

• Run diagnostic reports.

Understanding PeopleSoft Enterprise CRM Diagnostics

CRM diagnostics consist of seven PeopleSoft application packages, or plug-ins, that can help to troubleshoot the PeopleSoft Enterprise CRM system setup or integration related problems. When you report a problem to the PeopleSoft Global Services Center, the support representative might ask you to run a diagnostic package to determine how the system is set up.

The delivered diagnostic packages are sufficient to diagnose most system problems. To develop additional diagnostic packages that meet installation-specific needs, use the PeopleTools Application Designer.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

PeopleSoft Enterprise CRM diagnostic packages produce reports that appear at the workstation or are emailed to you. You can run the following seven diagnostic packages:

Package Name	Purpose
DIAG_CMSETUP	Displays information about correspondence management installation and setup: • Merge Server Definition. • Merge Server Printers. • Setup Merge Server. • Install Options. • FTP URL Details for Correspondence Management. • Process Scheduler Server Names for Correspondence Management Jobs. • Process Scheduler Server Details.

Package Name	Purpose
DIAG_COMMSETUP	Displays information about communications setup: • Configuration table. • Churn event setup. • Churn event set setup. • Churn score setup.
DIAG_EIPGATEWAYINFO	Queries the connection URL and displays information about multiple gateways, if multiple gateways are set up.
DIAG_EIPMESSAGENODES	Displays information about node definition: • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Status (active, inactive).
DIAG_EIPMESSAGES	Displays information about EIP messages that is sorted by the different application names: • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Message handler. • Message handler type. • Status (active, inactive).
DIAG_FSISETUP	Displays the following: • Operator, business unit, and setID. • Role code and role name. • Role mapping. • FSI issues setup.
DIAG_SEARCHBUILDSETUP	Displays the following: • Information about the last search build. • Run control information. • Search parameters for CRM_RB_SRCHDB. • Search records. • Search records and fields.

Package Name	Purpose
DIAG_DATASETRULES	Displays information about Data Set Rules: • Data Set Rules Name. • Status Active. • Search Record. • Rule Condition. • SQL.
DDIAG_PRODCATALOG	Displays information about Product Catalog through input prompt of SETID: • List of Products. • Catalog Details. • Product Association. • Product Criteria. • Security Membership. • Featured Products.
DIAG_RULEROLE_SETUP	Displays information about Role and Rules Setup through input prompt of Operator ID: • Role. • Role and Rules.
DIAG_SALESTERRITORY	Displays information about Sales Territory Info through input prompt of user id: • TREE MANAGER. • TREE MANAGER NODES. • TREE Details. • Territory Details.
DIAG_SALESUSER	Displays information about Sales User details through input prompt of user ID: • SALES USER DETAILS. • SALES USER VISIBILITY DETAILS. • SALES ACCESS PROFILE DETAILS.

Note. Before you can run any of these diagnostic packages, you must register them.

See Chapter 11, "Running Diagnostic Reports," Registering Diagnostic Packages, page 158.

Registering PeopleSoft Enterprise CRM Diagnostics

This section discusses how to run PeopleSoft Enterprise CRM diagnostics.

Page Used to Register PeopleSoft Enterprise CRM Diagnostics

Page Name	Object Name	Navigation	Usage
Register Diagnostics	PT_DIAG_FRAME_REG	Application Diagnostics, Register Diagnostics, Register Diagnostics	Register diagnostic packages to run in the PeopleSoft Enterprise CRM system.

Registering Diagnostic Packages

Access the Register Diagnostics page.

Register Diagnostics page

	Click the Look Up Plug In Name button and search for a package name that begins with DIAG.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Using Application Classes"

Running PeopleSoft Enterprise CRM Diagnostic Packages

This section describes how to run PeopleSoft Enterprise CRM diagnostic packages.

Pages Used to Run PeopleSoft Enterprise CRM Diagnostic Packages

Page Name	Object Name	Navigation	Usage
Launch Diagnostics	PT_DIAG_PLUGIN	Application Diagnostics, Launch Diagnostics, Launch Diagnostics	Select and run diagnostic packages.
PeopleSoft Diagnostics	PT_DIAG_PLUGIN	Select one or more listed plug-ins on the Launch Diagnostics page. Select the Display report in browser option and click the Generate Diagnostics button.	View the diagnostics for the selected plug-ins.

Selecting and Running Diagnostic Packages

Access the Launch Diagnostics page.
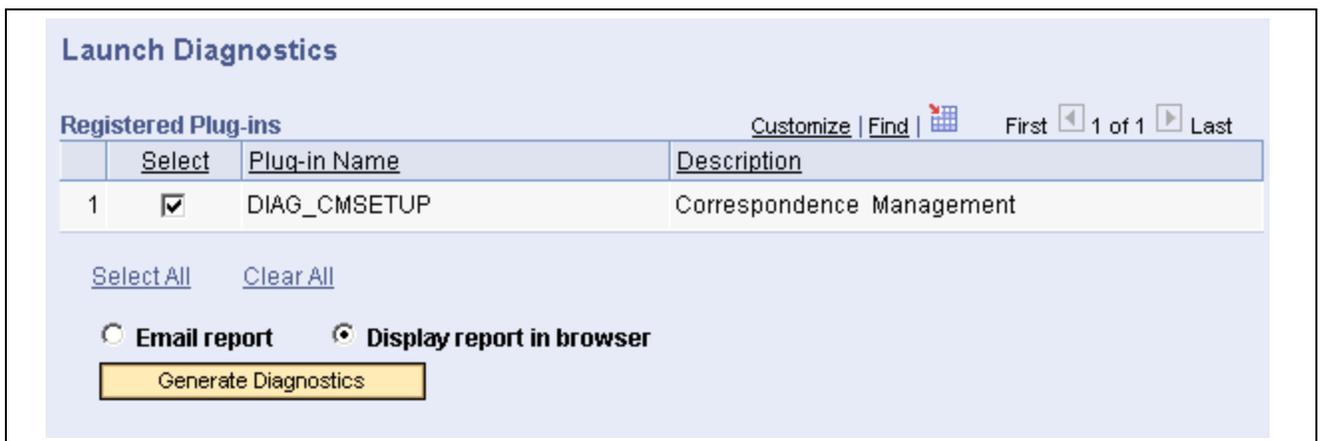
Launch Diagnostics page

Select one or more diagnostic packages to run and click the Generate Diagnostics button.

Email report   Select to have the report emailed to you

Display report in browser   Select to have the report appear in a separate popup window.

Viewing Diagnostics

Access the PeopleSoft Diagnostics page.

PeopleSoft Diagnostics

Database Name: **C1B89000**
User ID: **VP1**
Date Created: **2004-05-28-12.18.41.000000**
Database Type: **MICROSFT**

Plug-in Name: DIAG_CMSETUP
Description: Correspondence Management

Purpose: Corresponance Management Diagnotics

The following values were retrieved:
****Merger Server Definition**** ****PS_RBC_SERVER****
SERVERNAME MERGE_NT
STATUS_SETUP C
RBC_CMDLINE cscript.exe //B //T:3600 c:\Peoplesoft_Merge\Bin\PSFT_WORD_ENGINE.WSF
FOLDER_BIN c:\Peoplesoft_Merge\Bin
FOLDER_TEMP c:\temp
FOLDER_TRANS c:\Peoplesoft_Merge\Transaction
FOLDER_CACHE c:\Peoplesoft_Merge\Cache
TEMPLATE_CACHE_FLG Y
LANGUAGE_CD ENG
****Merger Server Printer**** ****PS_RBC_SRVR_PRINT****
****Setup Merger Server**** ****PS_RBC_SETUPFILE****

PeopleSoft Diagnostics page

PART 3

Workforce Management

Chapter 12
Setting Up and Maintaining Provider Groups and Group Members

Chapter 13
Managing Workforce Competencies

Chapter 14
Setting Up and Performing Assignment Searches

Chapter 15
Defining Holiday Schedules

Chapter 16
Using Calendars

CHAPTER 12

Setting Up and Maintaining Provider Groups and Group Members

This chapter provides an overview of provider groups and group members and discusses how to:

- Establish cost categories for workers.
- Define provider groups.
- Define schedules for provider groups.
- View team calendars.
- Define group assignment criteria and competencies.

Understanding Provider Groups and Group Members

Provider groups organize groups of workers that provide the services or support that are offered by an organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group. For cases, you can assign cases directly to provider group members (agents) rather than going through a provider group assignment.

You can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Provider groups might also represent workers who have specific competencies. Each worker that can be assigned to a service order must belong to at least one active provider group.

Provider Group Data Model

The following diagram illustrates that a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information:
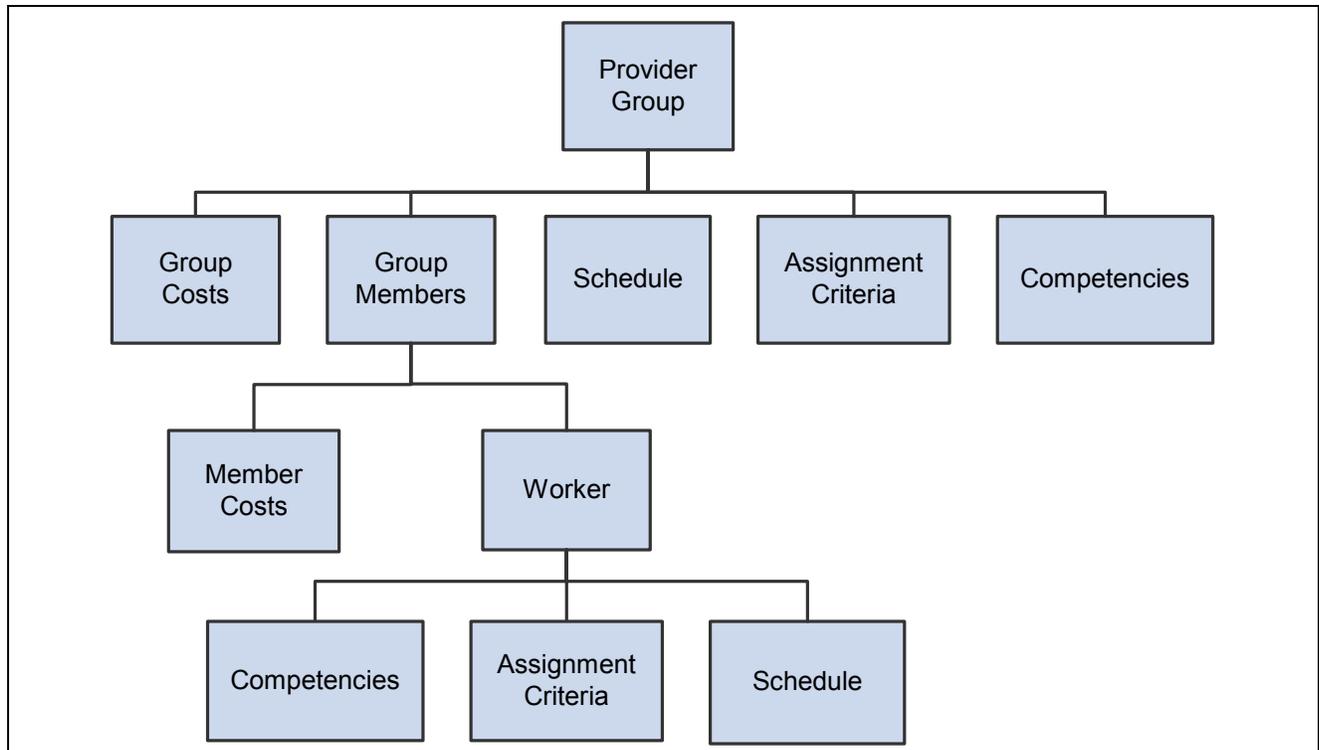
Provider group data model

Each group member can represent employees or third-party contractors. You can also define cost information for each worker in the group. Workers are defined using the Worker component.

Default Assignments for Service Orders

Default assignments for provider groups and group members can be automatically populated for service orders based on the related agreement or service. The defaults for an agreement take precedence over the defaults for a service. For on-demand service orders, the default provider group and group member information come from the service definition.

System-Suggested Assignments for Cases and Service Orders

For both provider groups and workers, you can define competencies and assignment criteria for provider group and group member assignment searches that are performed on a case or service order. The system uses the competency and assignment criteria to evaluate the best candidate for assignment to the case or service order.

To further inform assignment decisions, the system displays current availability status of each provider group or group member on the candidate list. To determine availability for a provider group, the system uses the schedule information—the hours of operations and holidays—that you define for the provider group.

For group members, the system determines availability by using schedule information that is defined on the worker's resource calendar, if it's available, or standard workweek information that is defined for the installation. In addition to availability status, the system also displays the current number of open cases that are assigned to each worker in the list when the assignment search is performed for a case.

Automatic Assignments for Cases

PeopleSoft Customer Relationship Management (PeopleSoft CRM) performs automatic assignment for regular and self-service cases based on the configuration rules that are set up at the call center business unit level. For each type of case (regular and self-service), you can configure separate assignment options for provider groups and group members (agents).

Regardless of the configuration, an existing provider group or group member assignment is never overwritten. For example, if you select a provider group for the case through the system-suggested assignment, the system does not attempt to assign a provider group when you save.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options".

Automatic Assignments for Service Orders

Similar to cases, you can enable PeopleSoft CRM to assign service orders automatically at save time by activating the automatic assignment feature at the field service business unit level.

The automatic assignment feature, however, does not overwrite any provider group or group member values that are present on service orders as a result of manual, default, or system-suggested assignment.

If the Candidate must be available check box is selected at the business unit level, the assignment engine only considers provider groups and group members that are available (during the time the service is performed) for the automatic assignment. No automatic assignment will be made if this check box is selected and there is no provider group or technician available.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments.

See Also

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

Chapter 14, "Setting Up and Performing Assignment Searches," page 185

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 375

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

Establishing Cost Categories for Workers

This section discusses how to define cost categories for workers.

Page Used to Define Cost Categories

Page Name	Object Name	Navigation	Usage
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Define cost categories to account for the cost of labor time to your company.

Defining Cost Categories

To define cost categories, use the Cost Categories (RF_COST_CAT_GBL) component.

Access the Cost Categories page.
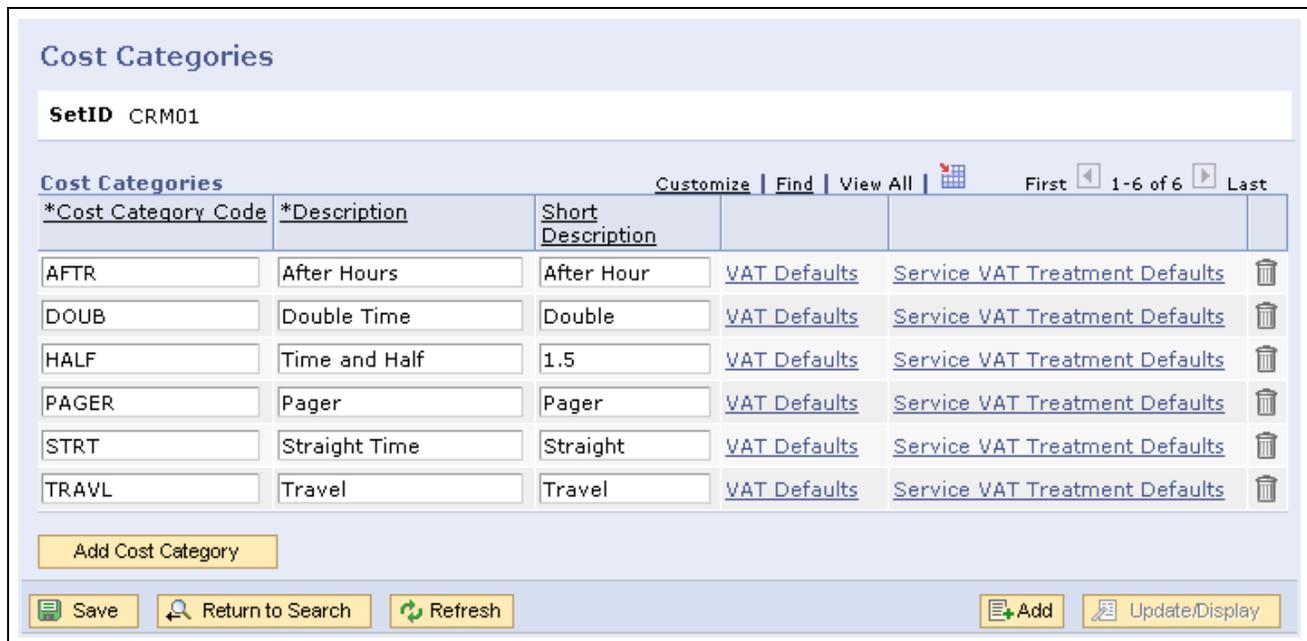
Cost Categories page

Once you define cost categories, establish an hourly cost rate for each category that provider groups use on the Provider Groups page. Specify cost categories and rates for group members on the Provider Group Member page.

Cost Category Code	Enter cost categories to account for the labor costs that the organization incurs; that is, the cost to provide a worker to perform a service for your customers.
VAT Defaults (value-added tax defaults)	Click to go to the VAT Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database.
	Use the page to specify a value for all the required fields, for any fields that require an overall default at the top of the VAT default hierarchy, or for any fields that require an exception to the value specified for a VAT driver higher up in the VAT default hierarchy. You can insert rows for any or all of the VAT driver keys, as well as the VAT country or state. You can also delete existing rows
Service VAT Treatment Defaults	Click to access the Service VAT Treatment Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use this page to enter VAT defaulting information for service VAT treatment.

Note. VAT is an acronym for value-added tax. Under many different names, VAT is in use in over 130 countries around the world. VAT is a governmental sales tax, a straight percentage that is added to the cost of a good or service. VAT can be inclusive (included in the price of a good or service), or exclusive (added to the price of a good or service).

See Also

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

Defining Provider Groups

To define provider groups, use the Provider Group (PF_PROVIDER _GRP) and Provider Group Member (RF_GRP_MEMBER) components. To load data into these tables for these components, you can also use the RF_PROVIDER _GRP_SCI and RF_GRP_MEMBER_CI component interfaces.

This section lists prerequisites and common elements, and discusses how to:

• Define provider groups.

• Define provider group members.

Prerequisites

Before you define provider groups, you must:

• Define workers by using the Worker component.

• (Optional) Define cost categories.

See Also

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

Common Elements Used in This Section

Hourly Rate and **Currency Code**
Enter the cost to your company for one hour of labor time that is charged to this cost category, and the currency that you use for the cost.

Multiplier
Enter a numeric value to generate an hourly billing rate that is based on the hourly rate.

Billable Rate
Displays the value that is calculated at save time or the next server trip that reflects the hourly billing rate, which is based on the following formula:

(Billable Rate) = (Hourly Rate) * (Multiplier)

Pages Used to Define Provider Groups

Page Name	Object Name	Navigation	Usage
Provider Groups	RF_PROVIDER_GRP	Workforce, Provider Groups, Provider Groups	Define and maintain the groups of people who perform service or support activities.
Provider Group Member	RF_GRP_MEMBER	• Workforce, Provider Group Members, Provider Group Member • Click the Details button on the Provider Groups page.	Define the people who are associated with a provider group.

Defining Provider Groups

Access the Provider Groups page.

Provider Groups page (1 of 2)

Provider Groups page (2 of 2)

Basic Information

Status

Select the current status of the provider group: *Active* or *Inactive.*

The system excludes all inactive provider groups from system prompt lists; therefore, you can't assign them to service orders and cases. Also, you can't change the status of a provider group to *Inactive* if any of its group members is currently assigned to an open service order or case.

Note. When you change the status of a provider group to *Inactive,* the status of all its members changes to inactive automatically and can't be modified unless you set the provider group status to *Active* again. To activate group members, you must manually change the status of each group member to *Active.*

If you change the status of a group member to *Inactive* by using the Worker component, the group member automatically becomes inactive in the associated provider group.

Type

For informational purposes, the Type defines whether members of the provider group are internal employees, partner or third-party maintainer (TPM) employees, or both.

Company Name

Select the company that is associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define a name for the third-party company. Click the Transfer to Company button to access the Company component and define an additional company.

Notifications

The system uses the notification routing preferences that are associated with the group member's user ID to publish workflow notifications about service order assignment changes that affect the group member. Routing preferences are defined for the group member's user profile on the Workflow page of the User Profiles component under PeopleTools, Security.

Use Members to Broadcast

Select to send all automated notifications (that are sent to the group) to each member's individual worklist instead of to the group worklist. The system never broadcasts manual notifications, regardless of whether this check box is selected.

Group Worklist and **Group Worklist Name**

Select the check box and the name of the group worklist that is associated with the provider group. Worklists are established on the Group Worklist page. As group membership changes, update permissions for the group worklist as necessary.

Preferred Notification

Select the preferred way of receiving notification: *Email, Worklist,* or *Both.*

Email Address

Enter the email address that is used to send notifications to the provider group.

Currency Code

Select the currency that is used to determine labor costs for the work that provider group members perform. The selected currency becomes the default for new rows in the Group Cost Categories grid. Currency codes are established on the Currency Code page.

Group Cost Categories

The Group Cost Categories grid reflects the costs per hour and corresponding billable rates for the members of the provider group.

Cost Category	Select the code of the cost category that is used to account for the labor time of members in the provider group. Cost category codes are defined on the Cost Categories page.
Hourly Rate, Currency Code, Multiplier, and **Billable rate**	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the group of members. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers," Setting Up Cost Categories.

Group Members

	Click the Details button to access the Provider Group Member page, where you can view or modify the group member record.
Name	Displays the name (first name followed by last name) of the group member. Before you can add a new person to the group, the person must be defined using the pages in the Worker component. Click the Transfer to Worker button that is next to this field to access the Worker component.
	Note. You can also define members of the provider group on the Provider Group Member page.
Status	Select the person's current status as a member of this provider group: *Active* or *Inactive.*
	The system excludes all inactive group members from system prompt lists, so you can't assign them to service orders and cases. You cannot change the status of a group member to *Inactive* if an open service order is assigned to the group member. Similarly, you cannot delete a group member if an open service order is assigned to him or her.

See Also

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

Chapter 5, "Working with Notes and Attachments," page 115

Defining Provider Group Members

Access the Provider Group Member page.

Provider Group Member page

To view details about the selected provider group, click the Transfer to Provider Group button that is next to the provider group ID to access the Provider Group page.

Member Information

Name	Displays the name of the group member that you enter when adding the record.
	Note. You can also define members of the provider group on the Provider Group page.
Currency Code	Select the currency that you use to determine the labor costs for the work that the group member provides. The selected currency becomes the default for new rows in the Member Cost Categories group box. Currency codes are established on the Currency Code page.

Member Cost Categories

The Member Cost Categories group box reflects the costs per hour and corresponding billable rates for the member.

Cost Category	Select the code of the cost category that you use to account for the labor time of the group member. Define cost category codes on the Cost Categories page.

Hourly Rate, Currency Code, Multiplier, and **Billable rate**	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the member. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

Assigned Service Orders

Use this section to view service order assignments for the group member. The system displays this grid only if the user has at least one assigned service order. Similarly for cases, the system displays the Assigned Cases grid only if the user has one or more assigned cases.

Unit	Displays the PeopleSoft Integrated FieldService business unit where the service order originated.
Service Order	Displays the number of the service order that is assigned to the group member. Click the Transfer to Service Order button to access that service order.

Assigned Cases

Use this section to view case assignments for the group member.

Unit	Displays the PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources. business unit where the case originated.
Case ID	Displays the number of the case that is assigned to the group member. Click the Transfer to Case button to access that case.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

Enterprise PeopleTools PeopleBook: Security Administration

Defining Schedules for Provider Groups

Schedule information determines when the provider group is available for assignment.

Page Used to Define Schedules for Provider Groups

Page Name	Object Name	Navigation	Usage
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Define the hours of operation for a specific provider group.

Defining Schedules

Access the Schedule page.

Schedule page

To define hours of operation for a provider group:

1. Specify the appropriate time zone.

   The time periods that you define in Hours of Operation group box appear in the time zone that you select.

2. Specify the appropriate holiday schedule, if applicable.

   If the date that an assignment search is performed corresponds to a holiday for a provider group, the system indicates that the provider group is unavailable for assignment. Define holiday schedules by using the Holiday Schedule page under Set Up CRM, Common Definitions, Calendars and Schedules.

   Note. You can update workers' calendars with specified holiday schedules by running the Load Holiday process (RF_HOLIDAY).

   ---

3. Select the days of the week that the provider group is open for business transactions.

   If the date that an assignment search is performed corresponds to a day that a provider group is not open for business transactions, the system indicates that the provider group is unavailable for assignment.

4. For each day of the week, specify the hours of operation.

   Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. Establish default values for this page on the Installation - Calendar Options page under Set Up CRM, Install, Installation Options.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 185

Chapter 15, "Defining Holiday Schedules," Associating Workers with Holiday Schedules, page 215

Chapter 15, "Defining Holiday Schedules," Updating Workers' Calendars with Specified Holiday Schedules, page 216

Defining Group Assignment Criteria and Competencies

This section discusses how to:

• Define assignment criteria.

• Associate competencies with provider groups.

Pages Used to Define Group Assignment Criteria and Competencies

Page Name	Object Name	Navigation	Usage
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define the criteria that you use to match a provider group to a case or service order.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency.

Defining Assignment Criteria

Access the Assign Group Criteria page.

Assign Group Criteria page (1 of 2)

Assign Group Criteria page (2 of 2)

When an assignment search is performed from a case or service order, the assignment engine calculates a point value for each criteria value on the service order or case that the provider group matches, based on the weight, or relative importance of the match. The sum of the point values becomes the provider group's fit score. Failure to match a criterion does not exclude the provider group from the list of suggested assignment candidates, but it lowers the provider group's total fit score.

For help desk cases, the assignment engine matches values for department, location, product, and product group. For service orders and support cases, the assignment engine matches values for customer, site, region, product, and product group.

Enter each region, customer, product, product group, location, department, and role that the provider group supports.

Region

Region information can be derived from information that is on the service order or case. At least one region is required.

Customer

If the provider group can support a customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

Enter the setID and the name of the product and the group's proficiency level for supporting the product. Available values for the Proficiency field depend on the product rating model that you specify for the setID on the Assignment Setup page of the Assignment Engine Setup component under Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors.

Product Group

Enter the product group that the provider group supports.

Person Type

Select the person type that the provider group supports. IT and HR Help Desk use the person type of the person on the case to assign provider groups and agents to cases based on the person's relationship to the organization. The available person types are *Contingent Worker*, *Employee*, and *Person of Interest*; . When assigning HR Help Desk cases, the Person of Interest person type is not considered.

Location

Enter the location that the provider group supports.

Department

Enter the department that the provider group supports.

Security Role

Enter the role that the provider group supports.

Note. Change management is the only product that uses role criteria for assignments.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 185

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

Associating Competencies with Provider Groups

Access the Group Competencies page.

Group Competencies page

PeopleSoft Integrated FieldService can evaluate which provider group is best qualified for assignment to a service order by comparing provider group competency and proficiency with the competency and proficiency that is required for a service or service activity on a service order.

Similarly, in PeopleSoft Support and PeopleSoft HelpDesk, the system can evaluate which provider group is qualified for assignment to a case by matching the competency and proficiency that you specify on the case in the Problem Type field with the competency that is defined for the provider group.

Assigned Competencies

Description	Select a competency. Establish competencies on the Competencies page of the Competencies component under Set Up CRM, Common Definitions, Competencies.
Proficiency	Select the provider group's level of expertise for the competency. The rating model that you define for the competency on the Competencies page determines the available proficiency values. In PeopleSoft Integrated FieldService, PeopleSoft Support and PeopleSoft HelpDesk, the system checks a provider group's proficiency level to determine whether the provider group is qualified to perform work on a service order or case that requires the competency.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 185

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

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

CHAPTER 13

Managing Workforce Competencies

This chapter provides an overview of competencies in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to set up competency information.

Understanding Competencies in PeopleSoft CRM

This section discusses:

• Competencies.

• Competency integrations.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 185

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

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

Chapter 3, "Setting Up General Options," Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 24

PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook

Competencies

In PeopleSoft CRM, competencies define the skills of the workforce. You can associate a set of competencies with provider groups and workers and define the competency proficiency level for each provider group and worker.

In PeopleSoft Integrated FieldService, define competency requirements for the services that the company provides, and the minimum level of competency proficiency that is required to perform a service or service activity.

Similarly, in PeopleSoft call center applications, you set up minimum competency proficiency requirements for the problem type, category, type or detail information that are used for case assignment. By comparing the competency requirements with the competencies that you define for your workforce, the system can generate a list of qualified candidates to assign to a case.

You can enter competencies and competency proficiency ratings by using components within PeopleSoft CRM or by integration with PeopleSoft Human Resources Management (PeopleSoft HRMS) or a third-party human resource management system.

Competency Integrations

These are the enterprise integration points (EIPs) that update CRM competencies with HRMS competencies.

Person Competency

This EIP synchronizes system tables with competency information that you define in a HRMS system. The Person Competency EIP includes two application messages: PERSON_COMPETENCY_FULLSYNC and PERSON_COMPETENCY_SYNC.

At initial implementation, the HRMS publishes a full set of competency records to PeopleSoft CRM by using the PERSON_COMPETENCY_FULLSYNC application message. When a user adds or modifies competency definitions in the human resources management system after the initial full synchronization, each change is published to PeopleSoft CRM by using the PERSON_COMPETENCY_SYNC application message.

Warning! A FULLSYNC overwrites any changes that you made to competency information in CRM.

Rating Model

The RATING_MODEL_FULLSYNC and RATING_MODEL_SYNC messages are used to initially load rating models from a HRMS system and to update competency rating models, respectively.

Competency

The COMPETENCY_SYNC and COMPETENCY_FULLSYNC messages are used to initially load rating models from a HRMS system and to update competency rating models, respectively.

Flow of Integration

PeopleSoft CRM is a subscriber to competency EIP messages, not a publisher. Any changes that you make to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with the human resources management system.

Make all updates to competency records in your human resources management system and publish them to PeopleSoft CRM, as the following diagram illustrates:
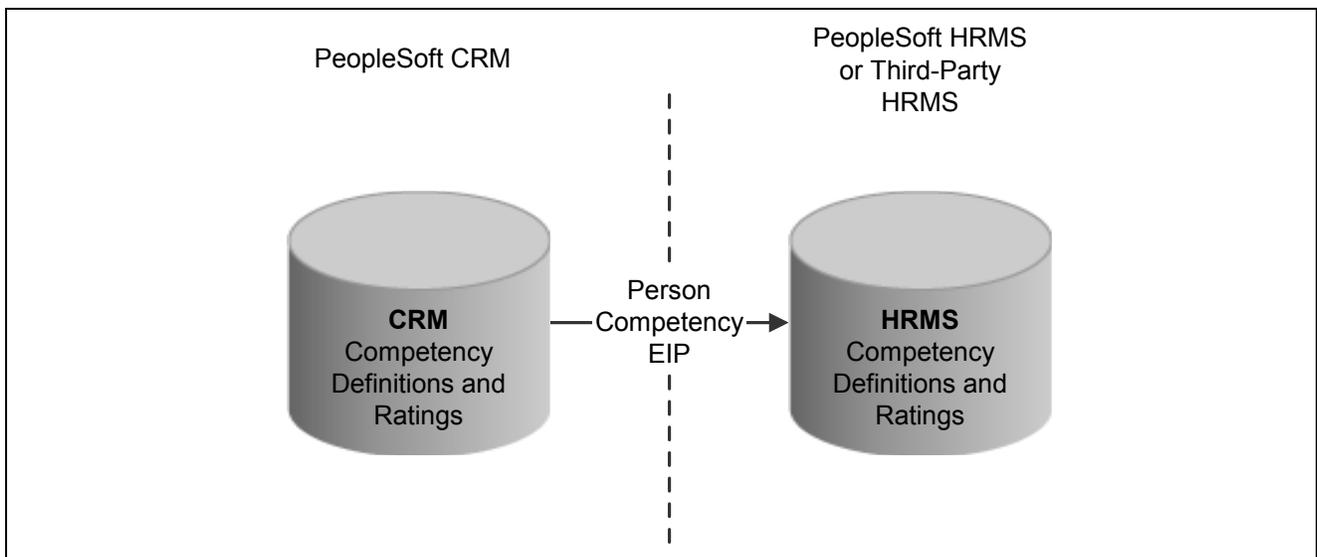
Flow of competency information from the human resources management system to PeopleSoft CRM

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

Setting Up Competency Information in PeopleSoft CRM

To define competency information, use the Review Rating (CM_REVW_RATING), Competency Type (CM_TYPE_TABLE), and Competency (COMPETENCY_TBL) components.

If you do not synchronize competency information with another system by using the Person Competency EIP, you can manually define competency rating models, competencies, and the competency proficiency for workers by using components in PeopleSoft CRM.

This section discusses how to:

• Define competency rating models.

• (Optional) Define competency types.

• Define competencies.

• Define competency proficiency levels.

• Define minimum competency requirements for service orders and cases.

Pages Used to Set Up Competency Information in PeopleSoft CRM

Page Name	Object Name	Navigation	Usage
Competency Rating Model	CM_REVW_RATING_TBL	Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model	Define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product.
Competency Types	CM_TYPE_TABLE	Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types	Define competency types, broad categories of competencies that are relevant to particular positions or projects. When you define a competency, it can be associated with one or more types.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Establish IDs for competencies and then tie the ID to the rating model and competency types.

Defining Competency Rating Models

Access the Competency Rating Model page.

Competency Rating Model page

A rating model specifies how you measure a provider group or worker's proficiency for a particular competency.

Rating Levels

Rating	Enter a code that represents the rating level. When defining a rating, you must enter a code by using one alphanumeric character.
Description	Enter a description of the rating code by using up to 30 alphanumeric characters.
	Note. Include the numeric number of the rating at the beginning of the rating level description. This enables the system to display the rating descriptions in numerical order instead of alphabetical order on the prompts where users select ratings levels.
Rating Points	Enter a numeric value that the assignment engine uses to represent the relative importance of each rating.
	Important! When defining rating point scales for rating models that are used to rate the proficiency of a provider group or worker, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values that the assignment engine calculates will not accurately reflect the best qualified candidate. The minimum proficiency, however, is tied to a service, not within the rating model.

See Also

Defining Competency Types

Access the Competency Types page.
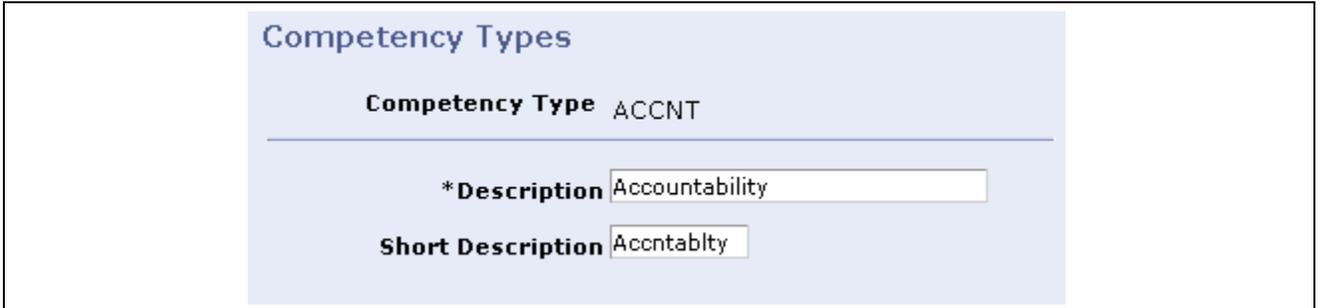
Competency Types page

Although competency types are not used by the system, you can develop reports that reflect competency categories.

Defining Competencies

Access the Competencies page.
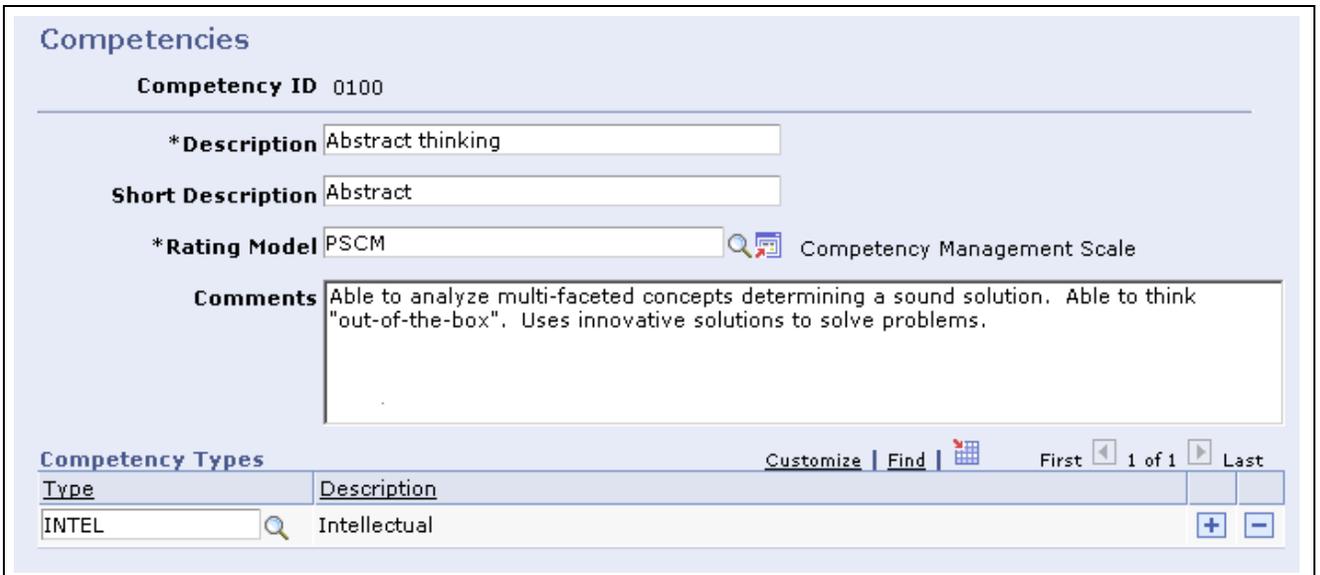
Competencies page

Competencies can represent any provider group or worker skills, abilities, knowledge, product support areas, or behaviors that are pertinent to jobs in the organization, such as the ability to repair and maintain specific products or equipment, knowledge of specialized manufacturing processes, or expertise with computer programming languages. The codes can be broad or detailed and can represent any type of competency.

To enable system-suggested assignments on service orders, define each skill that is required to complete work on a service order as a competency in your system. To enable system-suggested assignments on cases that are based on the problem type, category, type or detail that the user specifies, define competencies that correspond to this information.

Description   Enter a description that uses up to 30 alphanumeric characters.

> **Note.** These descriptions should make sense to a user that is viewing a list of problem types. For example, competencies like *Works independently* or *Microsoft Certification* are probably not appropriate descriptions for problem-type competencies. If the product is a laptop, appropriate problem type competencies may include *hard drive* and *network connectivity.*

Rating Model   Select the model that is used to evaluate a provider group or worker's degree of expertise for this competency. Establish rating models on the Competency Rating Model page.

Type   Select competency types for this competency, if applicable. Establish competency types on the Competency Types page.

Defining Competency Proficiency Levels

You establish competency proficiency for provider groups on the Group Competencies page of the Provider Groups component. Similarly, you establish competency proficiency for workers on the Competencies page of the Worker component.

The system uses the level of competency proficiency that you define for provider groups and workers to evaluate whether the provider group or worker is qualified to perform work on a service order or provide support on a case. You can also track the competency proficiency of your workforce for informational purposes.

See Also

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

Defining Minimum Competency Requirements for Service Orders or Cases

In PeopleSoft Integrated FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the minimum level of competencies that you define for the associated service or service activity with workers' proficiency for the corresponding competencies.

In PeopleSoft call center applications, you establish minimum competency proficiency requirements for the problem type, category, type or detail information on cases, which the system uses when performing call center agent assignment.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Setting Up Call Center Prompt Tables"

Setting Up and Performing Assignment Searches

The chapter provides an overview of assignment searches and discusses how to:

• Set up the assignment searches.

• Reviewing and assigning provider groups.

• Reviewing and assigning group members.

Understanding Assignment Searches

This section discusses:

• Fit scores.

• Activity.

• Assignment criteria.

• Candidate selection and fit score generation.

Fit Scores

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can perform assignment searches to find the provider groups and group members that are best suited to a case or service order. The system returns a list of eligible candidates ranked by *fit score*, which is an evaluation of how well each provider group or group member matched criteria on the case or service order.

In addition to fit score, the system displays current availability and, for group member assignment searches that are performed for a case, the number of open cases that are currently assigned to the group member.

The system doesn't restrict the workforce assignment only to what it suggests. You can select the provider group and group member that the system recommends, any provider group and group member on the list (regardless of the fit score, current availability, or case load), or any provider group and group member that does not appear on the list, to be assigned to a case or service order.

Note. If you use auto-assignment to assign a provider group member to a case and multiple members tie for the highest fit score, the system assigns the member with the lowest case load. If two or more members tie for highest fit score and lowest case load, the system selects the first person in the list. In this situation the system makes an arbitrary assignment based on the member with the lowest person ID.

Activity

The system displays the activity from the service order.

Because a competency may be required for more than one activity, this column indicates the activity to which the competency applies. This column does not appear when you perform the assignment search from a case.

Assignment Criteria

PeopleSoft CRM uses the assignment engine to generate recommendations for provider group and group member assignments. The assignment engine uses this information in the assignment evaluation process:

• General assignment criteria.

• Case-specific assignment criteria.

• Service order-specific assignment criteria.

• Weighting factors.

• Assignment search data model.

General Assignment Criteria

For each worker or provider group, you can define a list of values that the worker or provider group specializes or supports under these criteria: customer, location, product, product group, region, site, department, person type, security role.

When you perform an assignment search on a service order or case, the assignment engine matches the values of these criteria that are available on the service order or case to the values that are available on workers and provider groups. The weight, or relative importance, of each assignment criteria match determines a candidate's fit score.

Failure to match an assignment criteria value on a case or service order lowers the fit score but does not exclude a provider group or group member from the list of eligible candidates. However, if you do not select the Display Provider Groups and Group Members with no Criteria Matches check box on the Assignment Setup page, then a provider group or group member must match at least one criteria or competency value to be included in the list.

The assignment engine uses a different set of assignment criteria values when searching for a case in PeopleSoft HelpDesk or Support, or for a service order in PeopleSoft Integrated FieldService.

The table below illustrates:

• For help desk cases, the assignment engine matches values for department, location, product, product group, person type, problem type, and category, type, and detail (CTD) competencies.

• For help desk change requests, the assignment engine matches values for department, location, product, product group and security role. Help desk change requests are matched only against provider groups.

• For support cases, the assignment engine matches values for customer, site, region, product, product group, problem type, and CTD competencies.

• For service orders, the assignment engine matches values for customer, site, region, product group, product, service (or service activity) competency.

Assignment Criteria	Used in Support Case?	Used in Help Desk Case?	Used in Help Desk Change Request?	Used in Service Order?
Competency - CTD	Yes	Yes	Yes	NA
Competency - Problem Type	Yes	Yes	Yes	NA
Competency - Service	NA	NA	NA	Yes
Customer	Yes	NA	NA	Yes
Location	NA	Yes	Yes	NA
Product	Yes	Yes	Yes	Yes
Product Group	Yes	Yes	Yes	Yes
Region	Yes	NA	NA	Yes
Site	Yes	NA	NA	Yes
Person Type	No	Yes	No	No
Department	No	Yes	Yes	No
Security Role	No	No	Yes	No

As mentioned in the table, the assignment engine uses the region information to perform service order and support case assignment. A region search occurs when the Incident Address group box is available on a Case or Service Order page (according to the associated configuration template) with a specified incident location or when a region is associated with the site, contact, or customer on the transaction. The assignment engine runs the region search based on the zip code that you specify in the incident location.

Note. This is only if the incident location is being displayed. If not, the region is determined by the customer specified. In this case, the region match starts with this region (not the parent region like it does for zip code). The region is derived from a hierarchy based upon the site, contact and customer. When a service order or case is created, the region is determined by obtaining the region, if available, from the site, then the contact and customer. If a new region is specified for the site, customer or contact, there will be no region to match on with the assignment engine.

Before using zip codes as regions as assignment criteria, you must:

• Use the Region component to add zip codes as individual regions.

• Create a region, such as the Santa Clara county, and make it the parent region for all appropriate zip codes.

Note. You should define regions with the category of *Geography.*

When the assignment engine runs, the zip code of the incident location determines the region. The system looks for the zip code with a category of *Geography* in the region table and starts with the parent region for assignment matches.

The system continues to look at the region hierarchy and reports region matches for any provider groups and group members that match the parent or grandparent regions. For example, if the parent region of Santa Clara County is Northern California, then the system includes any provider groups or group members associated with Santa Clara County or Northern California. If the provider group or group member is associated with both Santa Clara and Northern California, the match will be on the lower region (in this case, Santa Clara County).

Case-Specific Assignment Criteria

For assignment searches that you perform for cases, you can match the problem type and CTD competencies of the case with competencies that are defined for group members and provider groups.

You can specify competencies for problem types, categories, specialty types and details to be used when the system performs an assignment search from a case in PeopleSoft Support or HelpDesk.

The assignment engine matches the competency values in these fields on the case with group members or provider groups that are associated with the same competency values. Any provider group or group member that does not meet the minimum competency proficiency defined for the CTD or problem type will not have a match for the competency.

Note. There is a hierarchical relationship among category, specialty type, and detail. A category includes specialty types, which contain details. When all three levels of information are available in a case that needs to be assigned, the value from the lowest available level is used in the assignment search. For example, if the case has a category, specialty type and detail, the assignment uses the competency information that is defined for detail when performing the assignment search. If it has category and specialty type, the system uses the competency information for type. If it has only the category, the system uses the competency information for category.

Service Order-Specific Assignment Criteria

For assignment searches that you perform for service orders, the assignment engine matches (besides general assignment criteria) the competency proficiency of provider groups and group members with the minimum competency proficiency requirements on the service (or service activity). Any provider group or group member that does not meet the minimum competency proficiency that is defined for the service or service activity will not have a match for the competency.

The service competency data that the assignment engine uses depends on:

• Whether competency data is defined for a service or service activity.

• Whether the assignment search is initiated from the service order activity actions section or the service order line.

If activities are defined for the service, the assignment engine uses only the competency requirements that are defined for the activities, even if competencies are also defined for the service.

If you perform the assignment search from the service order activity actions for a service with one or more activities, the system evaluates provider group or group member competency against the competency requirements that are defined for all activities that are associated with the service.

If you perform the assignment search from the service order line, the system considers only the competency requirements of the activity on the line.

If no activities are defined for the service, the assignment engine uses the competency information that is defined for the service. If no competencies are defined for the service, the assignment engine does not perform a competency match; it uses only assignment criteria matches to evaluate candidates for service order assignment.

Weighting Factors

You can define the relative importance of assignment criteria for provider group and group member searches. These weights may differ between the provider group and group member.

For example, if the CTD competency (applicable to support and help desk cases) has no importance when assigning provider groups in cases, but region is important, set the group weight for the CTD competency to *0* and the weight for region to *5*.

If CTD competency and product are equally important and customer is somewhat important for group member searches, you can then set the weights to *5, 5,* and *3,* respectively.

Assignment Search Data Model

This diagram illustrates the information that the assignment engine uses to generate a list of provider groups or worker candidates to assign to tasks on a help desk case, support case, or service order and to display current availability status:

Provider Group and Worker Assignment Data

Case and Service Order Assignments Data

Provider Group

Schedule
- Hours of operations
- Holiday schedule

Competencies
- For problem types and CTD (defined for case assignments)
- For services (defined for service order assignments)

Assignment Criteria
- Customer
- Site
- Location
- Region
- Product
- Product Group

Worker

Resource Calendar
- Standard work hours
- Assigned tasks

Competencies
- For problem types and CTD (defined for case assignments)
- For services (defined for service order assignments)

Assignment Criteria
- Customer
- Site
- Location
- Region
- Product
- Product Group

Helpdesk Case
- Location
- Product
- Product Group
- Current Time
- Competencies (Problem type and CTD)

Support Case
- Customer
- Site
- Region
- Product
- Product Group
- Current Time
- Competencies (Problem type and CTD)

Support Order
- Customer
- Contact
- Site
- Region
- Product
- Product Group
- Customer Preferred and Committed Start and End Dates and Times
- Service

Service

Competencies

Service Order Line
- Planned Start and End Dates and Times
- Activity

Activity

Competencies

Assignment Search Data Model

Note. The HelpDesk case, provider group assignment criteria, and worker assignment criteria should also contain the person type.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Workers," Maintaining Worker Information

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

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Setting Up Call Center Prompt Tables"

Candidate Selection and Fit Score Calculations

For both provider group and group member searches, the assignment engine builds a table in the database that represents each criteria match between provider groups or group members and the values on a service order or case.

After completing the search, the system returns a list of the provider groups or group members with criteria matches. The aggregate fit score of the provider groups or group members sequences the list.

Evaluating Workforce Assignment

For each assignment criteria match between a provider group or group member and the evaluated help desk case, support case, or service order, the system inserts a row into a temporary table called Criteria Fit (RF_ASSIGN_FIT).

Each row includes the name of the group member or provider group, the criteria that was matched, and the relative importance, or weight, of the match. The weight value for the match becomes the number of points that are assigned to the match.

For matches on problem type competency, CTD competency, or both, the number of points depends on the number of competencies and the provider group or group member's proficiency for those competencies.

For service competency matches, the number of points also depends on the number of competencies and the provider group or group member's proficiency for those competencies. For these reasons, the number of competency points may be less than the competency weight.

Determining Workforce Availability

The system determines the availability status of each provider group or group member. For provider groups, the system checks the hours of operation and the holiday schedule that you define for the provider group on the Schedule page in the Provider Group component.

If the customer preferred (or committed, if customer preferred doesn't exist) start and end dates and times on a service order, or the current date and time on a case, correspond to an open period for the provider group, and if the start and end dates are not on their holiday schedule, the provider group is considered available for assignment.

For group members, the system checks for tasks on the worker's resource calendar as well as the worker's schedule.

If the customer preferred start and end dates and times on a service order (if they don't exist, the system uses the committed dates), or the current date and time on a case, correspond to a period during the group member's standard work hours for which no other task has been assigned, the group member is considered available for assignment.

Establish standard workweek and workday hours during installation on the Calendar Options page (select Set Up CRM, Install, Installation Options). You can modify an individual worker's standard hours on the Schedule page in the Worker component.

Displaying Case Load for Candidates

For group member assignment searches that you perform from a case, the system determines how many open cases are currently assigned to the group member. To facilitate workload balancing, this information appears for each agent who is returned for a group member search.

Calculating Candidate Fit Scores

For each provider group or group member with a criteria match that is recorded in the Criteria Fit table, the system sums the weight value that is associated with each criteria match row and calculates the fit score for the provider group or group member using this equation:

$$\text{Fit score} = \frac{\text{Total number of match points for the provider group or group member}}{\text{Number of possible match points for the case or service order}} \times 100$$

Fit score

where the number of possible match points is defined by the criteria weight factor.

For example, for a group member assignment search, suppose that Jon Smith matched three assignment criteria (region, customer, and site) on a service order for which no competency requirements were defined, and this is the weight for each of the matching assignment criteria that applies to service orders:

- Customer = 5
- Region = 4
- Product = 3
- Site = 0
- Competency - Service = 4

The total number of possible match points is the total of the weight values: $5 + 4 + 3 + 0 + 4 = 16$.

For the service order in this example, Jon Smith matched region, customer, and site. His total number of match points is calculated as follows:

$4 + 5 + 0 = 9$

Jon's fit score = 9 / 16 x 100 =56%

Accounting for Competency Proficiency on a Service Order

When calculating fit scores for service order assignments, the assignment engine accounts for the provider group or group member's competency proficiency and the relative importance of the competency that is defined for the service or service activity using this equation:

$$\text{Competency score} = \frac{(C1Wt^*C1CP) + (C2Wt^*C2CP) + \dots (CnWT^*CnCP)}{(C1Wt^*C1MP) + (C2Wt^*C2MP) + \dots (CnWT^*CnMP)}$$

Competency score

- $CnWt$ is the weight of the competency defined for the service or service activity.

- $CnCP$ is the candidate's proficiency rating for the competency.

- $CnMP$ is the maximum proficiency rating.

For example, suppose that the service order in the previous example was for an air-conditioner maintenance service with no activities. The air-conditioner maintenance service has two competency requirements: basic maintenance and compressor replacement.

The basic maintenance competency requires a minimum proficiency of 2 on a 1 to 6 rating scale, where 6 is the maximum proficiency rating. The compressor replacement competency requires a minimum proficiency of 3 on the same rating scale.

The service definition for air-conditioner maintenance weights the relative importance of the basic maintenance competency for performing the service as a 5 on a 0 to 5 scale, while the relative importance of the compressor replacement competency is weighted at 2 on the same scale.

This table summarizes the competency data for the air-conditioner maintenance service:

Competency	Minimum Proficiency	Relative Importance to the Service ($CnWt$)	Maximum Proficiency on Rating Model ($CnMP$)
Basic Maintenance (C1)	2	5	6
Compressor Replacement (C2)	3	2	6

This table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, and Jane Markowitz:

Worker	Basic Maintenance Competency Proficiency ($C1CP$)	Compressor Replacement Competency Proficiency ($C2CP$)
Jon Smith	4	3
Bill Jones	2	0
Jane Markowitz	5	4

The competency score for each technician is calculated as follows:

Jon Smith's competency score = (5 * 4) + (2 * 3) / (5 * 6) + (2 * 6) = 0.62

Bill Jones' competency score = (5 * 2) / (5 * 6) + (2 * 6) = 0.24

Notice that Bill Jones did not match the proficiency requirements for the compressor replacement competency; therefore, no points for the match are included in the calculation.

Jane Markowitz's competency score = (5 * 5) + (2 * 4) / (5 * 6) + (2 * 6) = 0.79

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor of the corresponding assignment criterion, which is defined for you in your installation.

Let's assume that the same criteria weight factors as in the previous fit score calculation example: Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Service = 4.

Let's also assume that, except for the competency proficiency on competency - service, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

Jon Smith's fit score = 4+5+0+(4*0.62)/ 5+4+3+0+4 = 0.717

Bill Jones's fit score = 4+5+0+(4*0.24)/ 5+4+3+0+4 = 0.622

Jane Markowitz's fit score = 4+5+0+(4*0.79)/5+4+3+0+4 = 0.76

The assignment engine sorts these candidates:

- Jane Markowitz, 76%
- Jon Smith, 72%
- Bill Jones, 62%

If you view the detail scores, the system displays the criteria matches that compose the fit scores. For example, under Jon Smith's name, you would see this breakdown:

Criteria	Competency	Score
Region	NA	4/16 = 25%
Customer	NA	5/16 = 31.3%
Site	NA	0/16 = 0%
Competency - Service	Basic Maintenance	(4 x (5 x 4) / 42) / 16) = 11.90%
Competency - Service	Compressor Replacement	(4 x (2 x 3) / 42) / 16) = 3.6%

Accounting for Competency Proficiency on a Case

Similar to calculating service and service activity competencies, when the assignment engine calculates fit scores for case assignments, it accounts for the provider group or group member's competency proficiency and the relative importance of the competency values that are specified for problem type or CTD on the case using this equation:

$$\text{Competency score} = \frac{(C1Wt*C1CP) + (C2Wt*C2CP) + ... (CnWT*CnCP)}{(C1Wt*C1MP) + (C2Wt*C2MP) + ... (CnWT*CnMP)}$$

Competency score

- $CnWt$ is the weight of the competency that is defined for the problem type or CTD.
- $CnCP$ is the candidate's proficiency rating for the competency.
- $CnMP$ is the maximum proficiency rating.

For example, suppose that the case involves a problem with a personal computer (PC) and the required problem type competency and category competency are IBM PC Hardware and PC Configuration, respectively. If Jon Smith has a proficiency of 4 on a 1 to 6 rating scale for both competencies, then Jon's competency score for problem type is:

4 /6 = 0.666

His competency score for the category is also 0.666.

Let's assume that the following criteria weight factors are set:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Jon Smith matches the customer and both competencies on the case, then his fit score is calculated as follows:

Jon Smith's fit score = 5+(4*0.666)+(4*0.666) / 5+4+3+0+4+4 = 0.516 or 52%

Accounting for Product Proficiency on a Service Order or Case

When calculating fit scores for service order and case assignments, the assignment engine accounts for the provider group or group member's product proficiency using this equation:

Product score = PCP/PMP

- PCP is the candidate's proficiency rating for the product.
- PMP is the maximum proficiency rating.

For example, suppose that the case or service order involves a problem with an air conditioner.

If Bill Jones has a proficiency of 2 for this product on a 1 to 6 rating scale, then Bill's product score is:

2 / 6 = 0.333

Let's assume that the criteria weight factors are the same as in the previous examples:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Bill Jones matches the customer and product on the case or service order, this is how his fit score is calculated:

Bill Jones' fit score = 5 + (3*0.333) / 5+4+3+0+4+4 = 0.299 or 30%

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 163

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Workers," Maintaining Worker Information

Chapter 13, "Managing Workforce Competencies," page 179

Setting Up the Assignment Searches

To define assignment searches, use the Worker (RD_WORKER_2), Provider Group (RF_PROVIDER_GRP), Service (RF_SERVICE), Problem Type (RC_PROBTYPE), Category Type Detail (RC_CA_TY_DE) and Assignment Weighting Factors (RF_ASSIGNMENT_WGHT) components.

This section discusses how to:

• Define worker schedules and assignment criteria.

• Define provider group schedules and assignment criteria.

• Associate competency information with services and service activities.

• Associate competency information with problem types.

• Associate competency information with categories, and specialty types and details.

• Establish weighting factors for provider group criteria matches.

• Establish weighting factors for group member criteria matches.

• Specify assignment engine setup.

Pages Used to Set Up Assignment Searches

Page Name	Object Name	Navigation	Usage
Job	RD_ASGN_JOB	Workforce, Search Worker, Job	Specify a holiday schedule for the worker. This information helps to determine worker's availability.
Work Schedule	RD_WORKER_SCHEDULE	Workforce, Search Worker, Work Schedule	Specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page. This information helps to determine worker's availability.
Skills and Competencies	RD_WORKER_CMP_PROF	Workforce, Search Worker, Skills and Competencies	Associate competency information with the worker. This information is optional.
Assignment Criteria	RD_WORKER_CRITERIA	Workforce, Search Worker, Assignment Criteria	Define assignment criteria for the worker. This information is optional.
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Specify a holiday schedule and workday information for the provider group. This information helps to determine provider group's availability.

Page Name	Object Name	Navigation	Usage
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define assignment criteria for the provider group. The Region criterion is required when defining provider groups.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate competency information with the provider group. This information is optional.
Service Details	RF_SERVICE_ATTRIB	Set Up CRM, Product Related, FieldService, Services, Service Details	Associate competency information with the service. This information is optional.
Service Activities	RF_SERVICE_ACT	Set Up CRM, Product Related, FieldService, Services, Service Activities	Associate competency information with the service activity. This information is optional.
Problem Type	RC_PROBTYPE	Set Up CRM, Product Related, Call Center, Problem Type, Problem Type	Associate competency information with the problem type. You use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional.
Category	RC_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Associate competency information with the category. This information is optional.
Type and Detail	RC_CA_TY_DE_PNL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type and Detail	Associate competency information with the type and detail. This information is optional.
Group Weighting Factors	RF_ASSIGN_WGHT_PG	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider groups.

Page Name	Object Name	Navigation	Usage
Member Weighting Factors	RF_ASSIGNMENT_WGHT	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider group members.
Assignment Setup	RF_PRD_RATE_MDL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup	Specify the rating model that is used to define proficiency levels for product competencies and configure search results.

Defining Worker Schedules and Assignment Criteria

Define workers using the Worker component.

Specifying Holiday Schedules

Access the Job page.

Note. You are not required to define standard workweek information for your installation or for individual workers. However, the system requires this information to create entries automatically on a worker's calendars when a service order is assigned to the worker.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers," Entering Job Details.

Specifying Workday Information

Access the Work Schedule page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers," Defining Default Schedules.

Associating Competencies with Workers

Access the Skills and Competencies page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers," Associating Competencies with Workers.

Defining Assignment Criteria

Access the Assignment Criteria page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers," Defining Job Assignment Criteria.

See Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Group Assignment Criteria and Competencies, page 174.

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 163

Defining Provider Group Schedules and Assignment Criteria

Every worker who can be assigned to a case or a service order must be associated with an active provider group. Define provider groups using the Provider Group component.

Specifying Holiday Schedules and Workday Information

Access the Schedule page.

See Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 172.

Defining Assignment Criteria

Access the Criteria page.

See Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Assignment Criteria, page 174.

Associating Competency Information with the Provider Group

Access the Group Competencies page.

See Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Associating Competencies with Provider Groups, page 177.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Workers," Defining Job Assignment Criteria

Associating Competency Information with Services and Service Activities

Access the Service Details and Service Activities pages.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, "Setting Up Services".

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, "Setting Up Services," Defining Services.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, "Setting Up Services," Defining Activities.

Associating Competency Information with Problem Types

Access the Problem Type page.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

Associating Competency Information with Categories, Specialty Types, and Details

Access the Category and Type and Detail pages.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

Establishing Weighting Factors for Provider Group Criteria Matches

Access the Group Weighting Factors page.

Group Weighting Factors page

Select the relative importance of a provider group's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management only), and sites (service orders and support cases).

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 163

Establishing Weighting Factors for Group Member Criteria Matches

Access the Member Weighting Factors page.

Member Weighting Factors page

Select the relative importance of a of a group member's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management), and sites (service orders and support cases).

Specifying Assignment Engine Setup

Access the Assignment Setup page.

Assignment Setup page

Rating Model	Enter the rating model to indicate required proficiency levels for products. Establish rating models on the Competency Rating Model page.
Default Assignment Page	Select the page that the system initially returns when you perform a search. Values are:
	Summary: The system displays the Provider Group Summary page when you perform a provider group search and the Candidate Summary page when you perform a provider group member search for a technician or agent.
	Detail: The system displays the Provider Group Detail page when you perform a provider group search and the Candidate Detail page when you provide a provider group member search for a technician or agent.
Display Provider Groups and Group Members with no Criteria Matches	Select to enable all provider groups and group members to appear as part of the assignment engine search results when you click Suggest a Provider Group or Suggest a Group Member from a case or service order. Clear this check box if only the provider groups and group members that have criteria matches should appear in the search results.

See Also

Chapter 13, "Managing Workforce Competencies," Defining Competency Rating Models, page 182

Reviewing and Assigning Provider Groups

This section lists common elements and discusses how to:

• Review provider group summary search results and assign provider groups.

• Review provider group detail search results and assign provider groups.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders,"
Setting Up Automatic Service Order Assignments

Common Elements Used in This Section

Provider Group Name	Displays the name of the eligible provider group. Click the Transfer to Provider Group button next to the name to access the Provider Group component and view the provider group definition record.
Select	Click to assign the selected provider group to the corresponding service order or case.
Available	Displays the group or group member's availability. A green circle indicates availability; a red square indicates unavailability.
	Note. The Available column does not appear if you do not specify a start or end period on the service order.
Score	Displays the provider group's score for the criteria match based on the assignment weight factor that is defined on the Group Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the provider group.
Return To Service Order and **Return To Case**	Click to return to the component (service order or case, respectively), where you access this page.

Pages Used to Review and Assign Provider Groups

Page Name	Object Name	Navigation	Usage
Provider Group Summary	RF_ASSIGN_PG_SEC	• On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Summary link if the Provider Group Detail page appears. • On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. Click the Summary link if the Provider Group Detail page appears. • On the Dispatch Board page click the Suggest a Provider Group button. • On the Change Request Task page, click the Suggest Assignments button.	Review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case.

Page Name	Object Name	Navigation	Usage
Provider Group Detail	RF_ASSIGN_PGDT_SEC	• On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Detail link if the Provider Group Summary page appears. • On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. Click the Detail link if the Provider Group Summary page appears. • On the Change Request Task page, click the Suggest Assignments button. Click the Detail link if the Provider Group Summary page appears. • On the Dispatch Board page click the Suggest a Provider Group button. Click the Detail link if the Provider Group Summary page appears.	Review the provider group search result (detail view). You can select a provider group that you can assign to a service order or a case from here as well.

Reviewing Provider Group Summary Search Results and Assigning Provider Groups

Access the Provider Group Summary page.
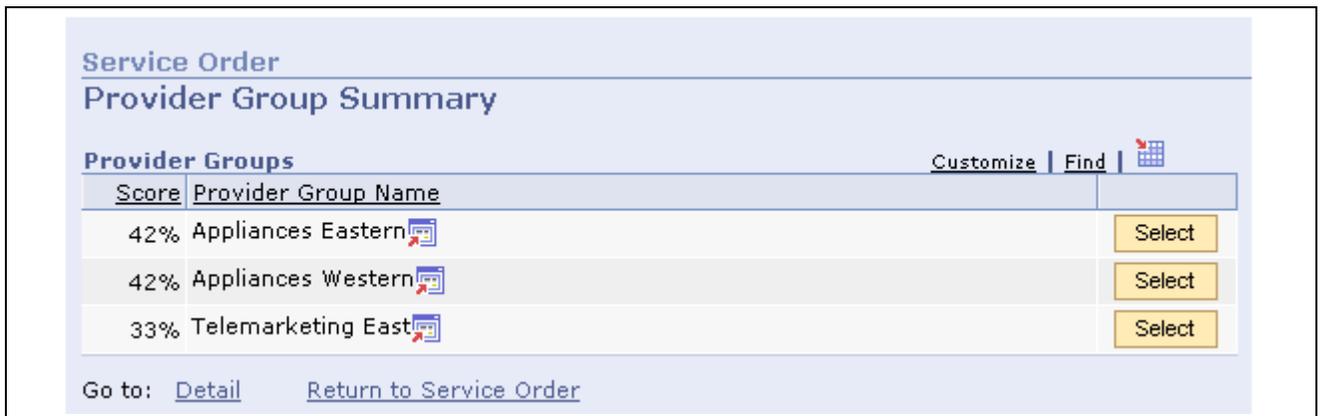
Provider Group Summary page

The Provider Group Summary page lists provider groups that matched at least one assignment criteria value on the case or service order.

Detail   Click to access the Provider Group Detail page and view the assignment
                                          weight factors that are used to calculate the fit scores.

Reviewing Provider Group Detail Search Results and Assigning Provider Groups

Access the Provider Group Detail page.

Provider Group Detail page

Summary   Click to access the Provider Group Summary page.

Criteria Code   Displays the assignment criterion on the case or service order that the
                                          provider group matched.

Reviewing and Assigning Group Members

This section lists common elements and discusses how to:

• Review group member summary search results and assign group members.

• Review group member detail search results and assign group members.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders,"
Setting Up Automatic Service Order Assignments

Common Elements Used in This Section

Select   Select this check box to indicate a group member to assign, and then click
                                          the Select button. If the assignment is for a service order line, you can select
                                          multiple group members.

Name   Displays the name of the eligible group member. Click the Transfer to Worker
                                          button to access the Worker component and view the worker definition record.

Cases	Displays the number of cases that are assigned to an agent. This column appears only for worker assignment searches that you perform from a case in PeopleSoft Support or HelpDesk.
Score	Displays the group member's score for each criteria match based on the criteria assignment weight factor for the criteria code that you define on the Member Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the group member.
Return To Service Order and **Return To Case**	Click to return to the service order or case from which you accessed this page.

Pages Used to Review and Assign Group Members

Page Name	Object Name	Navigation	Usage
Candidate Summary	RF_ASSIGN_LIST_SEC	• On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears. • On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. Click the Summary link if the Candidate Detail page appears. • On the Dispatch Board page, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears.	Review the group member search result (summary view) and select group members that you can assign to a service order or a case.
Candidate Detail	RF_ASSIGN_DET_SEC	• On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears. • On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. Click the Detail link if the Candidate Summary page appears. • On the Dispatch Board page, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears.	Review the group member search result (detail view). You can select a group member that you can assign to a service order or a case from here as well.

Reviewing Group Member Summary Search Results and Assigning Group Members

Access the Candidate Summary page.

Candidate Summary page

The Candidate Summary page lists the members in the provider group who matched at least one assignment criteria value on the case or service order, or all provider group members if you select the *Display Provider Groups and Group Members with no Criteria Matches* check box on the Assignment Setup page. For support and help desk cases, the system shows the number of open cases that are currently assigned to each group member on the list.

Note. You must specify a provider group on the case or service order before performing a search on group members.

| Detail | Click to access the Candidate Detail page and view the assignment weight factors that are used to calculate the total fit scores. |

Reviewing Group Member Detail Search Results and Assigning Group Members

Access the Candidate Detail page.

Candidate Detail page

Summary   Click to return to the Candidate Summary page.

Criteria Code   Displays the assignment criterion on the case or service order that the candidate matched. Associate values for each criteria code with workers on the Assign Criteria page in the Worker component.

CHAPTER 15

Defining Holiday Schedules

This chapter provides an overview of holiday schedules and discusses how to:

• Define holiday schedules.

• Associate provider groups with holiday schedules.

• Associate workers with holiday schedules.

• Update workers' calendars with specified holiday schedules.

Understanding Holiday Schedules

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can associate holiday schedules with provider groups and individual workers. You can schedule a process to update worker calendars to reflect holiday information. On calendars, holidays appear as a type of task.

In PeopleSoft Integrated FieldService, the assignment engine indicates on the assignment search result that an eligible provider group or worker is unavailable for assignment if the period that the committed start and end dates defined on a service order coincides with a defined holiday.

Similarly, in PeopleSoft call center applications, the assignment engine indicates that a provider group or worker is unavailable for case assignment if the date on which you perform the assignment search corresponds with a defined holiday. (Regardless of availability, however, you can always manually assign provider groups and workers to a case or service order.)

Important! Workers do not inherit holiday schedules from their provider groups.

Because workers can belong to multiple provider groups, you must define and maintain holiday schedules for workers and provider groups separately. If you want workers to inherit holiday schedules from their provider groups, you must institute a manual process to ensure synchronization of holiday schedules.

Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

To define holiday schedules, time frames and sales quotas, use the Installation (RB_INSTALLATION), Holiday Schedule (HOLIDAY_SCHED_TBL) and Time Frames (RSF_TF) components.

This section discusses how to:

• Define standard workday information.

• Define holidays.

• Define time frames for forecasting, pipeline analysis, planning and portfolio examination.

• Define time frames for sales quota relapse.

Pages Used to Define Holiday Schedules

Page Name	Object Name	Navigation	Usage
Calendar Options	RF_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Define standard workday information. The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars.
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule	Define holidays.
Timeframes	RSF_TF_MAIN	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Timeframes	Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
Sales Information	RSF_TF	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information	Define time frames for sales quota rollups.

Defining Standard Workday Information

Access the Calendar Options page.

See Chapter 3, "Setting Up General Options," Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 24.

Defining Holidays

Access the Holiday Schedule page.

Holiday Schedule page

When you add a new date to the list of holidays, enter a description (up to 30 alphanumeric characters). This description appears on the workers' calendars.

Define Time Frames for Forecasting, Pipeline Analysis, Planning, and Portfolio Examination

Access the Timeframes page

Timeframes page

Period Definition Tab

Select the Period Definition tab.

Select the period (for example, annual, daily, monthly quarterly, and so on) for the time frame.

Enter a description of the period (for example, Q1, 2005 FY, and so on). The Time Frame field uses the name that you enter for the time frame and the text that you enter in the Period field to enter a description of the time frame.

Select the begin and end dates and then enter a long and short description for the period.

Usage and Status Tab

Select the Usage and Status tab.

Use the Period Use field to indicate how you plan to use the information generated in the time frame that you are defining. You can select either *All, Pipeline Only, Forecast and Pipeline,* and *Planning and Portfolio.* Use the Status field to indicate the status of the usage for the time frame.

Define Time Frames for Sales Quota Rollups

Access the Sales Information page.

Sales Information page

After you enter the time frames on the Timeframes page and save it, select the Sales Information tab and enter quota information for the time frame group that is being defined.

Quota Information

Use the fields in this group box to define sales quotas by period definition (for example, annual, biweekly, daily, monthly, and so on). You can also use the Define Detailed Quotas option to define revenue details by business unit, product, product group, industry, region, revenue type, and territory.

Quota Rollup Tab

Select the Quota Rollup tab.

Use the Quota Rollup Period field to select the time period that the period should roll up to for reporting or forecasting reasons.

For example, suppose that you are entering monthly time frames based on a quarterly reporting system, the April, May and June periods should roll up to the 2nd quarter rollup period.

Associating Provider Groups with Holiday Schedules

Specify the appropriate holiday schedule on the Schedule page under Workforce, Provider Groups, Schedule.

The assignment engine checks the holiday schedule and hours of operation that you define for a provider group to determine whether an eligible provider group is available for assignment to a service order or case.

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 172

Associating Workers with Holiday Schedules

Associate workers with the appropriate holiday schedule on the Job Detail page under Workforce, Worker, Job Detail.

When you select a holiday schedule for a worker, the system updates the worker's calendar to reflect the selected holiday schedule when you save the record. If you don't select a holiday schedule for a worker, no holidays are reflected on the worker's calendar.

Note. If you change a worker's holiday schedule on the Job Detail page, when a user saves the page, the system deletes all existing holidays on the worker's calendar and records the holidays of the new schedule starting from the beginning of the calendar year.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Workers," Defining Job Assignment Criteria

Updating Workers' Calendars with Specified Holiday Schedules

This section discusses how to update workers' calendars with specified holiday schedules.

Page Used to Update Workers' Calendars with Specified Holiday Schedules

Page Name	Object Name	Navigation	Usage
Holiday Load	RUN_CNTL_RF1000	Workforce, Load Holidays, Holiday Load	Update workers' calendars with specified holiday schedules.

Updating Workers' Calendars with Specified Holiday Schedules

Access the Holiday Load page.

Holiday Load page

You should maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the next year's official holidays. When you add additional dates to the holiday schedules that you define with the Holiday Schedule page, run the Load Holiday process (RF_HOLIDAY).

For example, you might define next year's holidays in the last quarter of this year. After defining the holiday dates for the coming year, run the Load Holiday process to have the system record the new dates on workers' calendars.

Note. When you run the Load Holiday process, the system updates workers' calendars to reflect the changes in the associated holiday schedule from the current date forward. If you delete a holiday for a date prior to the current date, the system does not delete the past holiday from the calendars. However, if you delete or add a holiday for a future date, the system updates calendars to reflect the holiday schedule changes.

Load Criteria

The Load Criteria group box indicates the parameters for the Holiday Load process. Before running the process, you must associate a holiday schedule with each worker who needs the update on the Job Detail page.

One Worker   Select to load the holiday schedule for the worker who you specify in the
                                         Name field. The system displays the Name field after you select this option.

All Workers/One Schedule   Select to load the holiday schedule that you specify in the Holiday Schedule
                                         field for all workers who are currently defined in the system and have the
                                         specified holiday schedule. The system displays the Holiday Schedule field
                                         after you select this option.

All Workers/All Schedules   Select to load all holiday schedules that are associated with each worker
                                         in the system.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 16

Using Calendars

This section provides an overview of calendars and discusses how to:

• Set up calendars.

• Integrate calendars with third-party applications.

Understanding Calendars

In PeopleSoft Customer Relationship Management (PeopleSoft CRM) every worker has access to their own My Calendar page to view their monthly, weekly, or daily calendars. Managers can update calendars to reflect daily tasks. In PeopleSoft Sales, system events can automatically update sales representatives' calendars to reflect leads and opportunities.

Similarly, in PeopleSoft Integrated FieldService, system events can automatically update technicians' calendars to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks for worker availability. If a worker has another task scheduled, or if the start and end times of the task are not within the worker's scheduled work hours, the system indicates that the worker is unavailable.

Note. License the PeopleSoft Infosync application to provide end users with the capability to synchronize data between their CRM calendar and PIM (Personal Information Manager) calendar. PeopleSoft Infosync supports the data synchronization of contacts, tasks and calendars between the CRM system and Microsoft Outlook or Lotus Notes. For more information on the product, visit the PeopleSoft website and search for the Infosync product under the Customer Relationship Management product line.

Calendars and Tasks

The calendar is another way to view tasks. To appear in the calendar, a task must satisfy these conditions:

• The Show In Calendar check box must be selected when the task type is defined.

• The task must have a start date, start time, end date and end time.

• A task appears in the calendar of assignees or invitees only if the person accepts the task or invitation.

Note. If a calendar item is linked to a transaction (for example, company, lead, opportunity or partner) the system displays the appropriate page for that transaction when the user clicks the link for the task subject. If the task is not linked to a transaction, the system displays the Task Details page. Also, if a task spans multiple days, the system displays the task only on the start date on the calendar page.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Working with Territories"

Setting Up Calendars

This section discusses how to:

• View daily calendars.

• View weekly calendars.

• View monthly calendars.

Common Elements Used in this Section

Daily	Click this link to go to the daily calendar page.
Weekly	Click this link to go to the weekly calendar page.
Monthly	Click this link to go to the monthly calendar page.
View Other Calendars	Click this link to go to the Other Calendars search page to view calendars of other workers. Depending on how you implement security, a worker may not be able to view the calendars of other workers. It is more typical for managers to use this link to view the calendars of the people that report to them.
Add Calendar Entry	Click this link to access the Task Details page and add calendar entries. For specific information on adding calendar entries refer to the section on Managing Tasks. See Chapter 23, "Working with Tasks," Managing Tasks, page 357.
Calendar Item Entry	Click this link to go to the page that displays the calendar item. This could be a service order, case, lead, opportunity, or the Task Details page where a user can view and change meeting times, appointments, scheduled phone calls, reminders, and to do items.
Time Zone	Every user can personalize their own time zone setting by clicking the My Personalizations link at the bottom of the menu navigation on the left side of the page. To change the time zone you would then click the Personalize Option button for Regional Settings. You can also set up time zones for workers using the Worker component. To display time zone information, the system first looks to see if the user has personalized their own time zone. It then goes to the Worker component to see if there is time zone information for the worker's location. If there are no settings for either, the system uses the database time zone.

Pages Used to Set Up Calendars

Page Name	Object Name	Navigation	Usage
Daily Calendar	RB_TSK_CALENDAR	• Click the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService. • Click the gray bar that represents a task for a worker on the dispatch board in PeopleSoft FieldService. • Click a scheduled task or a day on the Monthly Calendar or Weekly Calendar page.	View a worker's daily calendar.
Weekly Calendar	RB_TSK_CALENDAR	Click Weekly Calendar link on the Daily Calendar or Monthly Calendar page.	View a worker's weekly calendar.
Monthly Calendar	RB_TSK_CALENDAR	Click Monthly Calendar link on the Daily Calendar or Weekly Calendar page.	View a worker's monthly calendar.
My Tasks - User Preferences	RB_TSK_PREF_SEC	My Tasks Click the Preferences on the toolbar in the My Tasks component.	Set the default calendar view (daily, weekly, or monthly). See Link to Task Management chapter - Setting Task Defaults

Viewing Daily Calendars

Access the Daily Calendar page.

Daily Calendar page

Go To	Displays the date for the events appearing on the calendar. To view different days, enter a new date, select a new date using the Choose a date button or use the Next Day and Previous Day arrows.
📅	Click the Choose a date button to access the Daily Calendar page for another date.
Daily, Weekly, Monthly, View Other Calendars, View My Team Calendars and **View My Calendar**	Click any one of these links to get a different view of your calendar or the calendars of other workers or team members.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders"

PeopleSoft Enterprise Sales 9 PeopleBook, "Setting Up Sales Security and Personalization"

Viewing Weekly Calendars

Access the Weekly Calendar page.

Weekly Calendar page

Go To	Displays the current date. To display a new calendar enter a new date, select a new date using the Choose a date button or use the Next Week and Previous Week arrows.
[31]	Click the Choose a date button to access the calendar page for another date.
	Note. You can also click the link under the day of the week to go to the worker's daily calendar for that day.

Viewing Monthly Calendars

Access the Monthly Calendar page.

Monthly Calendar page

Go To   Displays the month and year for the events appearing on the calendar. Select
                               a new month and year to go to a different calendar for the worker. To
                               access a calendar for a different month, click the Next Month and Previous
                               Month arrows.

                               Note. You can also click the link under the day of the week to access the
                               worker's daily calendar for that day.

Current Month	Click to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays nonwork days in light gray. This link only appears if you are not in the current month.

See Also

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

Viewing Team Calendars

This section provides an overview on team calendars and discusses how to:

• View daily team calendars.

• View weekly team calendars.

• View monthly team calendars.

• View other people's calendars.

Understanding Team Calendars

Using team calendars, sales managers can view the workload and calendar of their resources to evaluate their team's bandwidth to work on new leads and opportunities.

Having the functionality to view their team's calendar on a single page enables sales managers to more easily identify the specific meetings, conference calls, events and appointments that they might want to attend, which have been setup by their team members.

Pages Used to View Team Calendars

Page Name	Object Name	Navigation	Usage
Daily Team Calendar	RB_TSK_GRPCALENDAR	• Click the My Calendar link. • Click the View My Team Calendars link	View the calendars of your team for a single day.
Weekly Team Calendar	RB_TSK_GRPCALENDAR	Click the Weekly link on the Daily Team Calendar or Monthly Team Calendar page.	View the calendars of your team for a single week.
Monthly Team Calendar	RB_TSK_GRPCALENDAR	Click the Monthly link on the Daily Team Calendar or Weekly Team Calendar page.	View the calendars of your team for a single month.
Other Calendar	RB_TSK_GCAL_SRCH	Click the View Other Calendars link on the Daily Team Calendar, Weekly Team Calendar, or Monthly Team Calendar page.	Search for and view other people's calendars.

Viewing Daily Team Calendars

Access the Daily Team Calendar page.

Daily Team Calendar page

See Also

Viewing Weekly Team Calendars

Access the Weekly Team Calendar page.

Weekly Team Calendar page

See Also

Chapter 16, "Using Calendars," Viewing Weekly Calendars, page 222

Viewing Monthly Team Calendars

Access the Monthly Team Calendar page.

Monthly Team Calendar page

See Also

Chapter 16, "Using Calendars," Viewing Monthly Calendars, page 223

Viewing Other Peoples' Calendars

Access the Other Calendars page.

Other Calendars for Steve Moss

Use Search Criteria to Narrow the Search Results

Select the Person's Calendar to View

Name	Department
Rider Bookie	Sales and Services
Alan Bailey	Sales and Services
Frank Peterson	Sales and Services
Alice Teirney	Sales and Services
Steve Moss	United States Operations

My Calendar

▽ **Search**

Use Saved Search		
Person ID	begins with	
First Name	begins with	
Last Name	begins with	
Name	begins with	
DeptID	begins with	
Description	begins with	

▽ **Show in Results**

☑ Person as Sales Manager

Other Calendars page

Enter your search criteria in the fields within the Search group box and then click the search button at the bottom of the page. The system displays a list of names and their departments. Click the person's name whose calendar you want to view. The system takes you to that person's Daily Calendar page.

Integrating Calendars with Third-Party Applications

PeopleSoft CRM delivers two enterprise integration points (EIPs)—Calendar/Task and Task Type—to integrate the calendar functionality with third-party voice recognition applications.

In addition, you can take advantage of the PeopleSoft Infosync product, which provides end users with the ability to synchronize data between PeopleSoft CRM and PIM applications. PeopleSoft Infosync performs bidirectional synchronization of calendars, contacts and tasks between PeopleSoft CRM and Microsoft Outlook or Lotus Notes with a click of a button.

See Also

PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook, "Setting Up PeopleSoft Enterprise CRM Infosync Applications"

PART 4

Interactions and 360-Degree Views

Chapter 17
Working with Interactions

Chapter 18
Setting Up the 360-Degree View

Chapter 19
Using the 360-Degree View

CHAPTER 17

Working with Interactions

This chapter provides an overview of interactions in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to:

• Set up interaction status.

• View interactions.

Understanding Interactions

This section discusses:

• Interactions and subinteractions.

• Contact methods and status.

• Interaction creation.

• Interaction display.

• Interaction notes.

Interactions and Subinteractions

Interactions are communications between you and customers or workers. At the practical level, an interaction is, essentially, a call. Tracking such communications provides valuable insight into customer- and worker-related activities.

Subinteractions are interactions that relate to a specific PeopleSoft CRM transaction (or call type), such as a lead, order, or case. In essence, subinteractions are the activities that occur during a call.Notes that are associated with an interaction are also subinteractions. A single interaction can have zero, one, or many subinteractions.

Note. Interactions and subinteractions are not created for partner communications except from the 360-Degree View page.

External Customers Versus Workers

You create different types of subinteractions depending on whether an interaction is for an external customer or a worker. In most CRM applications, customers are external to an organization. Any person or organization whose data that you manage in one of the customer or partner components (Company, Partner Company, Person, or Site) is considered an external customer. However, in PeopleSoft HelpDesk and HelpDesk for Human Resources, customers are internal people whose data you manage in the Worker component.

The Worker component enables you to manage data for help desk internal customers and for CRM staff users such as salespeople, call center agents, and field service technicians. A worker can function as either a customer or as CRM staff; therefore, the creation of a worker interaction is context-dependent. Worker interactions are created only from the context of a help desk case, a human resources help desk case, or on the Worker 360-Degree View page.

For example, if you open a help-desk case for Mark Anderson, any correspondence that you send to Mark from that case is logged as an interaction, and the case itself becomes a subinteraction. If Mark is also a customer service representative, he might receive notifications that are related to cases for other callers. These notifications are not logged as interactions because, in this context, Mark is a contact, not a customer.

Subinteraction Types

You can create the following basic PeopleSoft CRM transactions as subinteractions of external customer interactions:

• PeopleSoft Support cases.

• PeopleSoft Sales leads.

• PeopleSoft Sales opportunities.

• All types of PeopleSoft Order Capture (collectively known as *order captures)*.

• Installed products.

• PeopleSoft Enterprise FieldService service orders.

• Notes.

You can create the following PeopleSoft CRM transactions as subinteractions of worker interactions:

• PeopleSoft HelpDesk cases.

• PeopleSoft HelpDesk for Human Resources cases.

• Notes.

Note. Additional types of subinteractions are available in PeopleSoft CRM industry-specific applications.

Contact Methods and Status

Every interaction has an associated contact method. An interaction's contact method categorizes the interaction. It indicates the direction (inbound or outbound) of the interaction and the communication channel. Inbound interactions occur when a customer initiates the contact; outbound interactions occur when you initiate the contact. Outbound interactions can be manual (for example, when a salesperson sends correspondence to a customer) or automatic (for example, when workflow notifies a customer that a case is closed).

Many communication channels are used for both inbound and outbound communications. For example, phone, email, and paper correspondence (whether mailed or faxed) can originate internally or externally. However, the customer always initiates web-based interactions. Therefore, the Inbound Chat and Inbound Web (for web self-service) contact methods do not have any outbound counterparts.

The Interaction Detail page contains the contents of the interaction (the text of the email, correspondence, or chat), and the interaction detail type identifies that detail type. For example, the phone interaction detail type is just one type, whereas the contact methods include Phone In and Phone Out. Contact methods include both the channel and the direction of the interaction (in or out), while the interaction detail type is used mainly to control different sets of interaction statuses. There are different sets of interaction statuses for different channels and directions.

Contact Method (INTERACTION_MTHD) and Interaction Detail Type (RB_MCF_DETAIL_TYPE) are translate fields.

Interaction Status

Every interaction has a status, which varies depending on the contact method. This table shows the valid statuses for each contact method.

Contact Method	Statuses
Chat	*Accepted*, *Requested* See *PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook*, "Working with Multichannel Applications".
Email out (outbound email), including email replies, ad-hoc email, and email that is sent through a correspondence request.	*Cancelled, Completed, Failed In Delivery,* and *In Progress.* See *PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook*, "Managing Email".
Email in (inbound email)	*Assigned, Canceled, Completed, Processing, New,* and *Reassigned.* See *PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook*, "Managing Email".
Synchronized Email	*Completed*
Phone	*Busy, Callback, Child Answered, Completed, In Progress, No Answer,* and *Do Not Call Again.* See Chapter 19, "Using the 360-Degree View," page 287.
Printer	None.
Self-Service	*Completed* See Chapter 21, "Working with Customer Self-Service Transactions," page 309.

An interaction's initial status depends on how the interaction is created. You can manually update statuses for interactions that you create using the 360-Degree View feature, but the system maintains statuses for other types of interactions.

Interaction Creation

You can create interactions manually, or the system can create them automatically. This table lists the situations in which the system creates interactions:

Condition	Subinteraction	Contact Method and Status Management
A user accesses a customer, partner, or worker 360-Degree View.	Created based on the user's actions in the 360-Degree View.	In the 360-Degree View, the user can see the contact method and can change it manually. The multichannel framework type is not user-selectable. In the 360-Degree View, the multichannel framework type is always *Phone*.
The PeopleSoft CRM Computer Telephony Interface (CTI) application uses a delivered CTI transaction to access a page in PeopleSoft CRM. **Note.** CTI transactions that you create do not automatically create interactions or subinteractions.	Created by the system if the transaction's target page is a subinteraction-enabled object.	Contact method: Phone Status default: *In Progress*
A user sends email or print correspondence using the PeopleSoft CRM correspondence management features.	The object from which the correspondence was sent.	Contact method: Outbound mail Status default: *In Progress*
A user sends a manual email to a customer (or, from the context of a help desk case, to a worker.) User-initiated email can be either an email response (if you use the PeopleSoft email response management system [ERMS]) or an ad-hoc email.	Multiple PeopleSoft CRM transactions can be related to both inbound and outbound email. Each of the related transactions to the outbound email has a subinteraction that the system created.	Contact method: Outbound email Status default: *In Progress*
The PeopleSoft ERMS processes an inbound email.	Created when a user manually associates related objects to the inbound email. If a newly received email is part of a thread, it automatically inherits its parent email's related objects and subinteractions.	Contact method: Inbound email Status default: *New*

Condition	Subinteraction	Contact Method and Status Management
The system sends an automated email to a customer, partner, or worker from the context of a help desk case to a worker. Automated email is sent by component event processing, by business project workflow, or by the ERMS system autoresponse process to structured email. **Note.** Auto -acknowledgement email sent by the ERMS system or in response to a customer's Contact Us submission does not create an interaction.	Component event processing creates an interaction; a business project does not. No subinteractions are created. A subinteraction is created by the ERMS autoresponse process if the subinteraction is associated with transactions.	Contact method: Outbound email Status default: *In Progress*
A self-service customer or partner submits a Contact Us message. The Contact Us page is available only to external customers or partners, not to workers.	The text of the message becomes the interaction note.	Contact method: Phone Status default: *In Progress*
A customer or partner requests a chat session from the self-service Contact Us page.	None.	Contact method: Chat Status: *Requested*
A self-service user creates a new case or updates an existing case in PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources.	The case that was created or updated.	Contact method: Phone Status default: *In Progress*

To record communications that occur outside of the PeopleSoft CRM system, users can manually create interactions using the appropriate 360-Degree View. Users might manually create interactions if:

• A phone call is placed or received without the use of the CTI system.

• A letter or fax is received.

• Email is sent from outside of the PeopleSoft CRM system.

• Email is received by a mailbox that the ERMS system is not monitoring.

Interaction Display

There are various interfaces for viewing interaction information.

Interactions in the 360-Degree View Pages

PeopleSoft CRM provides 360-Degree View pages for customers, partners, and workers. There are two separate 360-Degree View pages for workers: one for PeopleSoft HelpDesk and one for HelpDesk for Human Resources. As delivered, all of the 360-Degree View pages are configured to show interactions in the dynamic grid that you create for it. You can configure a dynamic grid to display all of that interaction's subinteractions when it is expanded.

The 360-Degree View page for a customer shows all of the interactions for that customer. The Partner 360-Degree View page shows all of the interactions for the partner.

Other Interaction Lists

In addition to the 360-Degree View pages, you can view lists of interactions using:

• Interaction history grids within transactional components.

  The components that you use to manage subinteraction-enabled components (including Cases, Leads, and Orders) include a grid that shows all interactions for the specific transaction.

• The Interaction List page.

  This page enables you to search for and access interactions directly from a menu (rather than from the context of a specific customer or transaction).

• The Recent Interactions pagelet.

  This pagelet displays recent interactions for a selected customer. The Recent Interactions pagelet is available with PeopleSoft CRM Portal Pack.

Interaction Details

From any interaction list, you can drill into the Interaction page, where you can see the details of a specific interaction. The page that appears depends on the interaction type:

• If the interaction was created on the 360-Degree View page, the details appear on the Interaction Detail page.

• If a correspondence request created the interaction, the details appear on the Interactions - View Correspondence page.

• If the interaction is an inbound or outbound email (other than email sent through a correspondence request), drilling into the interaction displays the appropriate email component.

• If the interaction is a chat session, the detail page shows the full chat transcript.

See Also

PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Portal Pack"

Modifying Interaction Status

This section discusses how to modify interaction status descriptions.

Page Used to Set Up Interaction Status

Page Name	Object Name	Navigation	Usage
Interaction Status	RI_STATUS_SETUP	Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status	Modify interaction status descriptions.

Modifying Interaction Status Descriptions

Access the Interaction Status page.
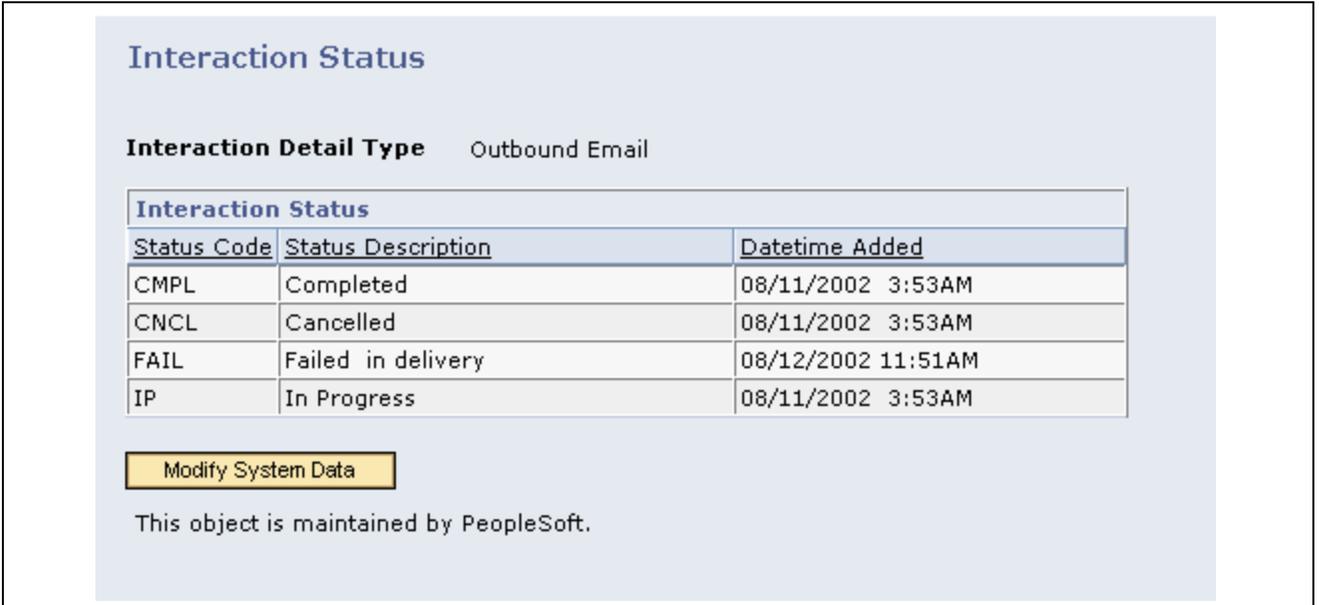
Interaction Status

Interaction Detail Type   Outbound Email

Status Code	Status Description	Datetime Added
CMPL	Completed	08/11/2002 3:53AM
CNCL	Cancelled	08/11/2002 3:53AM
FAIL	Failed in delivery	08/12/2002 11:51AM
IP	In Progress	08/11/2002 3:53AM

Modify System Data

This object is maintained by PeopleSoft.

Interaction Status page for an outbound email

Warning! If you change interaction statuses, you must make appropriate code changes in PeopleSoft Application Designer.

Status Code	Displays the statuses that PeopleSoft CRM delivers for the interaction detail type.

Viewing Interactions

This section discusses how to:

• Search for interactions.

• View interaction details.

• View interaction correspondence details.

Pages Used to View Interactions

Page Name	Object Name	Navigation	Usage
Interaction List	RI_INTERACT_HOME	Customers CRM, Interaction List, Interaction List	Search for interactions.

Page Name	Object Name	Navigation	Usage
Interaction	RI_INTERACTION	• Click the link for an interaction that has no associated contact method on the Interaction List page. • Click the link for an interaction that has no associated contact method on any 360-Degree View page. • Click the link for an interaction that has no associated contact method on the Recent Interactions pagelet.	View interaction details, including a list of related subinteractions and the complete text of any interaction note.
Interactions - View Correspondence	RBC_RECPIENT_INQ	• Click the link for an interaction that represents correspondence on the Interaction List page. • Click the link for an interaction that represents correspondence on any 360-Degree View page. • Click the link for an interaction that represents correspondence on the Recent Interactions pagelet.	View interaction details for the correspondence request.
Inbound Email	RB_EM_IB	• Click the link for an interaction that represents inbound email on the Interaction List page. • Click the link for an interaction that represents inbound email on any 360-Degree View page. • Click the link for an interaction that represents inbound email on the Recent Interactions pagelet.	View interaction details of inbound email.

Page Name	Object Name	Navigation	Usage
Outbound Email	RB_EM_OB	• Click the link for an interaction that represents outbound email on the Interaction List page. • Click the link for an interaction that represents outbound email on any 360-Degree View page. • Click the link for an interaction that represents outbound email on the Recent Interactions pagelet.	View interaction details of inbound email.
Chat	RB_CHAT_LOG	• Click the link for an interaction that represents chat on the Interaction List page. • Click the link for an interaction that represents chat on any 360-Degree View page. • Click the link for an interaction that represents chat on the Recent Interactions pagelet.	View interaction details of a chat.

Searching for Interactions

Access the Interaction List page.

Interaction List page

Search

Use this page region to define search criteria and perform searches. You can control the appearance and behavior of the interaction search by using the PeopleSoft CRM search configuration utility.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages".

As delivered, the system searches for all interactions when you first access the page. You cannot use this page to add interactions or edit interaction data.

The search criteria fields and the search results fields are the same as the identically-named fields on the interaction detail pages. Not all fields apply to all types of interactions. For example, only interactions that are created from a 360-Degree View page have a value in the Call Back date field.

Type   Select a subinteraction type. The search locates interactions that have the type of subinteraction that you select. Available values depend on which PeopleSoft CRM products you have licensed.

Interactions

This grid displays search results and lists all subinteractions, along with their interactions. Interactions that do not have subinteractions are not listed.

Click the Edit This Interaction button to access the Interaction page and view detailed information about the interaction. A different interaction detail page appears for each type of interaction.

Type   Displays links to associated subinteractions. An interaction can have more than one link. The link text is the subinteraction type—for example, *Case* or *Order*.

Viewing Interaction Details

Access the Interaction page.

Interaction page

Customer Information

Contact	Displays the name of the person (company contact, partner contact, consumer, or worker) for whom you created the interaction.

Interaction Information

The fields in this group box are identical to the fields in the Log Interaction group box on the 360-Degree View page.

See <u>Chapter 19, "Using the 360-Degree View," page 287</u>.

Related Transactions

This grid lists any subinteractions (including notes) that are associated with the interaction.

Note. Your internal business processes determine whether users enter notes in the interaction itself or in another transaction (such as a case or lead) that was the subject of the phone call.

Type	Displays the type of subinteraction. Available values depend on which PeopleSoft CRM products you have licensed.
Start Date & Time	Displays the date and time that the subinteraction was created.

Comments   Displays the full text of the note if the type is *Note.* For other types of related transactions, this field is blank or it may contain comments such as *Added New Case* or *Multi-channel related transaction.*

Other Page Elements

Return to 360-Degree View   Click this link to return to the 360-Degree View page. This link appears only if you originally accessed the Interaction page from the 360-Degree View page.

Return to Interaction List   Click this link to return to the Interaction List page. This link appears only if you originally accessed the Interaction page from the Interaction List page.

Viewing Correspondence Interaction Details

Access the Interactions - View Correspondence page.

The fields on this page are identical to the similarly named fields in the Correspondence Request page.

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

CHAPTER 18

Setting Up the 360-Degree View

This chapter provides an overview of the 360-Degree View and discusses how to:

• Define transactions for use on the 360-Degree View.

• Set up the 360-Degree View tree.

• Configure the 360-Degree View.

• Configure the 360-Degree View Search page.

Understanding the 360-Degree View

This section provides an overview of 360-Degree views in PeopleSoft CRM and discusses:

• 360-degree view integrations.

• 360-degree view search pages.

• 360-degree view system data.

• 360-degree view setup process overview.

See Also

360-Degree Views in PeopleSoft CRM

The PeopleSoft CRM 360-Degree View page enables you to manage actions and interactions for a business object—a customer or contact of customer , site or contact of site, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to launch transactions, such as quote and order creation, case creation, and opportunity creation.

More specifically, the 360-Degree View allows the agent to:

• Access related information concerning the business relationship with the customer, partner, or worker, such as a customer's installed products and the agreement associated with each one.

• Create a case in the background.

  The agent doesn't have to leave the 360-Degree View.

• Create a case or access a case from the context of the customer's or worker's related information, such as a particular installed product or even from the agreement associated with that product.

- Navigate to a new case page with one object in context; for example, to transfer to a new case from the context of a customer's installed product.

- Quickly perform an action without transferring to other objects, for example, creating a service order for an installed object in the background.

- Quickly verify and change first name, last name, email address, and phone number.

- View certain country-specific information in the Job and Position Summary, Pay Summary and Benefits sections of the Human Resources Help Desk (HRHD) Worker 360-Degree view.

See Reference Call Center PeopleBook for detailed information

The 360-Degree views that are available in PeopleSoft CRM are:

- Customer 360-Degree view.

- Partner 360-Degree view.

- Worker 360-Degree view.

- Human Resources Help Desk (HRHD) Worker 360-Degree view.

Role-specific data for a business object appears on the 360-degree view pages. The user can select a different business object role to have a different set of data appear, or search data based on date ranges that are specific to roles.

360-Degree View Trees

The 360-degree view pages represent, in tree format, the business activities between the organization (through an agent) and a customer, partner, or worker. You can build trees from the highest level of the hierarchy (root node) to the lowest level of the hierarchy. Tree terminology is derived from the concept of a family tree. The root node is the *parent,* and nodes that report to it are its *children.* Nodes that have the same parent are called *siblings.* These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time.

A tree node in the 360-Degree View tree has three parts: the node icon, the node name, and a node description. The name and description vary depending on the type of interaction. When defining the tree, you can specify an add, view all, and search node for a particular node of the tree.
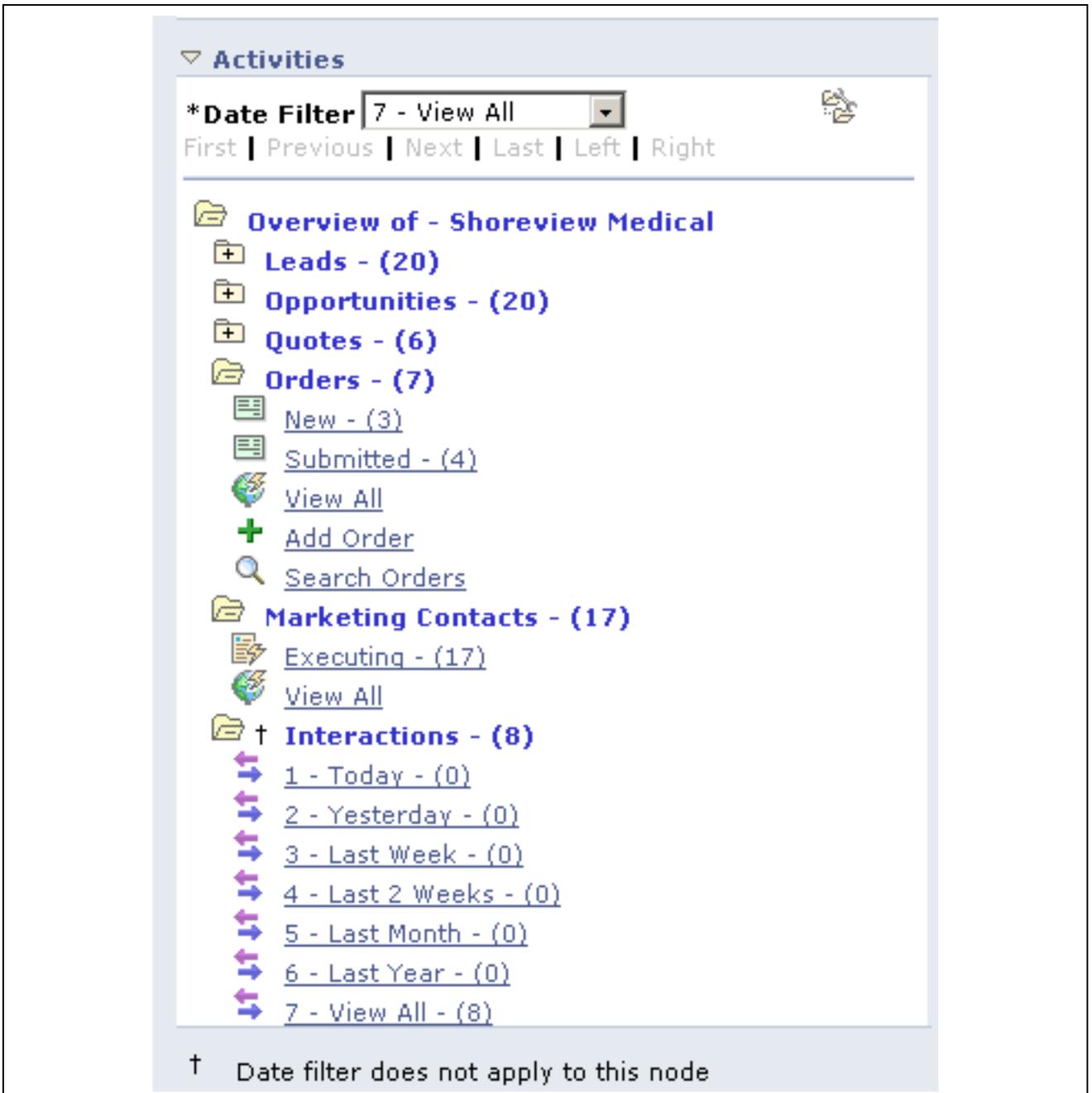
Example, 360-Degree View activity tree

In the sample data, PeopleSoft CRM delivers trees specific to these CRM applications:

• Support

• Field Service

• Sales

• Marketing

• Order Capture

• Financial Services

- Insurance

- Energy

- Communication

- Government

- HelpDesk

- Human Resources HelpDesk

- Partner

Interactions

An interaction is the sum of the events that take place when a customer contacts you. It might consist of several subinteractions.

An interaction is created:

- When you click a node that is interaction-enabled in the 360-Degree View tree to view or change the existing transaction.

- When you perform a transaction that is interaction-enabled by clicking the Go button next to the Actions drop-down field on the 360-Degree View.

- When you enter comments in the Note text box that appears in the Log Interaction page region and click the Save button on the 360-Degree View.

- When the 360-Degree View page appears through computer telephony integration, the system creates an interaction automatically for the phone conversation.

Subinteractions

A subinteraction is an event in an interaction.

You can configure the creation of subinteractions to meet business needs. Using the Configure Role page, you can specify whether or not to capture a transaction that you initiate from the 360-degree view as a subinteraction of a node.

An interaction may contain multiple subinteractions. For example, a call with a customer may involve updating a case, adding a service order, and sending a note about the customer. All of these subinteractions are logged under the same interaction.

Interaction Nodes

This figure shows how interactions and subinteractions are represented in the 360-Degree View tree when configured for date filtering:

This figure shows how interactions are represented when not date-filtered:

Interaction Node

In this example, the interaction details appear in the Dynamic grid.

Actions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform actions on behalf of the customer, worker, or company. The actions that you can perform appear in the Actions drop-down list on the upper right corner of the 360-Degree View page and in a similar drop-down list below the dynamic grid to the right of the Activities tree.

Actions that you can perform in the 360-Degree View include adding a case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of actions using PeopleSoft CRM setup pages.

You can also perform actions on these objects from the 360-Degree View while passing on related information, or *context*. Examples of context-endowed actions are the creation of a new case for the customer's installed product. The product would be listed in the Activities tree.

Action Categories

The action category specifies the method that performs the action that it is associated with. Because the action category is based on a method, it allows the action to pass contextual information while performing the action. Not only can you associate business unit and setID to the action performed, you can also pass the contents of a data record. This additional context allows you to carry product-related data forward into the underlying transaction required to serve the customer or worker. For example, you might configure an Add Case action category that identifies a customer's installed product and agreement on the new case.

The action category also defines the structure of confirmation information returned by the action that does not transfer to other components for performing the actions.

Setup involves:

- Specifying whether the action category is based on Business Unit, SetID or neither.

- Designating a record that returns the additional context, such as set control value or a Quick Codes, which can be passed to the method.

- Specifying a component name and the market for Display Template. This information is useful for Actions that use Display Template.

- Defining the contents of a Confirmation message for those actions that are performed in the background.

Dynamic Grid

The Dynamic grid displays details of a transaction that the agent selects in the Activities tree. It is located to the right of the Activities tree. The information displayed in the grid is configurable. You can also associate actions with the Dynamic grid, which appear in a drop-down list below it. To initiate an action, the agent selects the desired row on the grid and then selects the desired action from the drop-down list.

You can configure the Dynamic grid to display a secondary level.

Details displayed on the secondary grid are related to one of the primary grid objects. For example, you may want to display the cases entered against an installed product.

The 360-Degree View also lets you configure actions that can be performed on an object from the primary grid, allowing the agent to, for example, select an Installed Product and an Agreement and create a new case referencing these objects.

360-Degree View Integrations

360-Degree Views provide integration through EIPs to PeopleSoft Enterprise Supply Chain Management (SCM) Financials and Human Capital Management (HCM).

When you define tree nodes, you can specify enterprise integration points (EIPs) that return data from other PeopleSoft or third-party systems. This gives you the flexibility to include any type of information in the system in the 360-Degree View tree. EIPs are predefined; use them to request information from, for example, PeopleSoft SCM Financials for invoice and payment information that is associated with a customer.

You can click a receivables transaction to view the detail in PeopleSoft SCM Financials.

Note. You must enable single sign on before you can transfer from PeopleSoft CRM to SCM Financials or HCM.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook, "Understanding the 360-Degree View for Industries"

360-Degree View System Data

PeopleSoft CRM delivers predefined data for the 360-Degree View; including nodes, grid definitions, action categories, and transaction groups that are associated with nodes. You can set up 360-degree view trees that use this predefined system data. You set up additional information only if you need to change defaults. Actions are provided as sample data.

360-Degree View Setup Process

When you install PeopleSoft CRM, most of the necessary information is in place for you to set up the 360-degree view tree. PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, action categories, transaction groups that are associated with nodes, and grid definitions. You can set up 360-degree view trees that use this predefined system data. Set up additional information only if you need to change defaults.

To examine the predefined data, access the page where you set up that data by following the link in each step in the process below and search with no search criteria entered. The system displays a list of the predefined data that you can browse.

The general process for setting up the 360-Degree View is as follows:

1. Determine the actions that you want to be available from the 360–Degree View and whether you want them to pass context data when they are executed.

   If so, use the Action Category page to create a category that passes the data from the appropriate records. Then use the Action Definition page to associate the action with an Action Category.

   See Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 252.

2. Use the Transaction Group page to select the transactions that appear on the 360-Degree View, depending on the customer's role.

   When configuring a role for the 360-Degree View, you specify which transaction group should apply to that role.

   See Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 259.

3. Use the Dynamic Grid page to define a dynamic grid that lists important information from the transactions that are associated with each activity node.

   Optionally, associate an action to the grid. This will cause the display of an Action drop-down list for creating transactions associated with objects in the dynamic grid.

   See Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 279.

4. Use the Define Node page to define tree nodes that you can use to configure the 360-Degree View tree. Associate a dynamic grid with the node.

   When defining nodes, specify the node action and the type of node—placeholder, view, application class, or EIP.

   See Chapter 18, "Setting Up the 360-Degree View," Defining Nodes, page 261.

5. Use the Set Up Tree page to set up the 360-Degree View tree.

   When setting up the tree, you specify the tree structure, the images that appear in the tree, its size on the page, and what transaction should appear for each node on it.

   See Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 267.

6. Use the Set Up Profile page to set up the Profile group box that appears on the 360-Degree View.

   When setting up the profile, you can define the fields and buttons (as well as the buttons' actions) that appear in the Profile group box.

   See Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 272.

7. Use the Configure Role page to configure a PeopleTools role that is used to access the 360-Degree View.

When configuring a role, specify the tree, transaction group, and profile that you want to associate with this role. Plus, determine whether you want to capture subinteractions for the transactions that are associated with the transaction group and the nodes in the tree.

8. (Optional) If you are implementing the PeopleSoft CRM FSI Insurance or Government applications, use the User Links page to define user links that appear on the search page that accesses the 360-Degree View.

9. Use the 360 Degree Search Preferences - 360 Degree View Search Preferences page to specify the search page that you want to use to access the 360-Degree View.

Configuring Actions and Transactions for the 360-Degree View

To configure transactions for the 360-degree view, use the Define Action (RB_TD_ACT_DFN), Define Action Category (RB_TD_ACT_CAT) and Define Transaction Group (RB_TD_TRANS_SETUP) components.

This section provides an overview of transactions in the 360-Degree View and discusses how to:

- Define action categories.

- Define an action.

- Define transaction groups.

Understanding Actions and Transactions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Action drop-down box on the upper right corner of the 360-Degree View page.

When you create a transaction, you also create an object in the system. Transactions that you can create in the 360-Degree View include case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of transactions by using PeopleSoft CRM setup pages.

Actions are the tasks that create the transactions. You must associate actions to a Transaction Group when configuring a transaction.

Pages Used to Configure Actions and Transactions for the 360-Degree View

Page Name	Object Name	Navigation	Usage
Action Category	RB_TD_ACT_CAT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category	Create an action category for populating the Action drop down list.
Action Definition	RB_TD_ACT_DFN	Set Up CRM, Common Definitions, 360-Degree View, Define Action, Action Definition	Assign actions to Action Categories.
Related Dynamic Grid	RB_TD_DYNGRD_SUM	Set Up CRM, Common Definitions, 360-Degree View, Define Action, Related Dynamic Grid	View the dynamic grids that the action is associated with.
Transaction Group	RB_TD_TRANS_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group	Set up transaction groups and assign actions to them.
Copy Transaction Group As	RB_TD_TRANS_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Transaction Group, Copy Transaction Group As	Clone an existing transaction group. Cloning an existing transaction group makes a copy of it.

Defining Action Categories

Access the Action Category page.

Action Category page (1 of 3)

Action Category page (2 of 3)

Action Category page (3 of 3)

Action Category

This section defines the method that will be invoked by the actions that are associated with this Action Category. It can be a Component transfer or a Portal reference or an Application Class. Action Category that requires additional context to be passed must always have an Application Class. For example, passing Quick Codes in addition to Display Template information for creating a Case.

Status	Defines the Action Category status; either *Active* or *Inactive.* Only action categories that are active appear in the Action drop down.
Subinteraction	Select a subinteraction to correspond to the Action Category. The subinteraction appears on the Subinteraction list of the associated interaction, if any.

Transfer Type

Transfer	Select to transfer to another PeopleSoft CRM component and page. If you select Transfer, use the Component Navigation and Component Market fields to select the transaction to transfer to.
Transfer Mode	Select the mode in which to open this page for the transaction. Values are *Add*, *Correction*, and *Update/Display*.
Market	Select the desired market associated with the component to which the system transfers. A component is uniquely identified by its name and its market association. You can add records for each market.
Navigation	Select the Navigation Path to the desired component page.
	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation.
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.
Application Class	Select Application Class to specify a PeopleCode application class to control the transfer. You can click the Package Tree Viewer link to search for application classes.
	See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Using Application Classes".

Options

Use the Options fields to specify data retrieval information and additional context for the category's actions as well as display options. The Display Template fields determine the display template for the component that the action transfers to (if applicable).

Set Control Option	Select *Business Unit, Set ID* or *None* to specify the basis for tableset sharing for the action category. The default value is *None*. This is a required field.
Category Record	Select the category record that returns the additional context to be passed to the method, such as the set control value or Quick Code.
Set Control Field	Select the name of the set control field that appears in the Category Record. Available fields are determined by the Category Record selected.
Category Field	Select the category identifier field to appear in the Category Record. Available fields are determined by the Category Record selected.
Description Field	Select the description field that displays the desired text description of the action category when it is presented for selection during setup tasks. Available fields are determined by the category record selected.
Display Template	If the action requires a display template, select a component or a market, or a component *and* a market, to determine the display template to be used by the action.

Confirmation Details

Some actions transfer the system to another component. This would be typical if the user selected a Create Service Order action that requires further data entry on the Service Order page before it can be submitted. It is evident that the action was completed successfully when the 360-Degree View is replaced by the page of the component used in the action. Use the fields in the Confirmation Details group to specify how the system responds when an action that does *not* transfer the user to another component is completed.

In a confirmation, you can specify:

• Text message

  The text message is shown in the figure as the single line, "Case was successfully created."

• Action details

  Action details are the information that appears in the white panel. They are the fields defined in the Category Record. In the figure, this is the Case Number, Problem Summary, and Status fields. You can specify up to three fields.

The links are the bottom of the confirmation are not configurable.

In the page examples in this section, in which the action creates a case in the background using Quick Code, the confirmation includes a text message, the case number and summary, and a link to the case. Note that the Transfer option is not selected, as transfer is defined by the Quick Code.

Note. Before you can configure a confirmation, there must be a record in the database for storing the transaction's runtime information (the Detail Record). Records are created in Application Designer.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Catalog Number and **Message Number**	Select the Catalog Number and Message number to display the desired text on the confirmation message.
Detail Record	Select the record that defines the structure of the confirmation message. You can display a maximum of three fields.

Key Fields

Specify search criteria for retrieving data from the Category Record. Define additional keys using the Add mode.

Field Name	Select the name of a key field from those available for the Category Record.
Sequence	Specify the order of the key field in the search sequence.

Display Fields

Use Display Fields options to specify the fields containing the information in the Detail Record that you want to appear on the confirmation.

Field Name	Select the name of the field whose values you want to appear in the confirmation detail (white panel). Available fields are determined by the Detail Record selected.
Display Type	Select one of the following to indicate how the field name value is to be displayed on the confirmation:

- *Hyperlink*

  Select *Hyperlink* to enable the user to initiate the transfer by clicking on the field value text.

- *Long Translate*

  Not supported. This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.

- *Others*

  Select this option to display the value as a read-only.

- *PushButton*

  Not supported. Select to make this field appear as a button that initiates the transfer.

- *Related Display*

  Not supported. This option is for display of a custom element.

- *Short Translate*

  Not supported. This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.

Field Label ID	If you want the field to be displayed by its label, select *Field Label ID*.
Label Type	If you selected Field Label ID, specify whether to display the Long Name or Short Name for the field label.
Sequence	Enter *1*, *2*, or *3* to indicate the position of the text field in relation to the other text fields.
Description	The text description specified for the Display Field. It is not editable here.

Field Change Event

This section appears if you select *Hyperlink* as the Display Type.

Transfer	Select to transfer to another PeopleSoft CRM component and page.
Navigation	Select the navigation path to the desired component page.
	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation.
Market	Select the desired market associated with the component being transferred to. A component is uniquely identified by its name and its market association. You can add records for each market.
Action	Select the mode in which to open the component page being transferred to. Values are *Add*, *Correction*, and *Update/Display*.
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.

Application Class	Select to launch an application class that controls the transfer. You can click the Package Tree Viewer link to search for application classes.
Copy	Click to clone the Action Category. Any changes you made to the original action category are then saved, and the Copy Action Category page appears. The page contains a prompt for a new action category ID. Clicking the OK button creates the cloned action category and gives it the name of the original Action Category with the prefix *Copy of.*

Defining an Action

Access the Action Definition page.

Action Definition page

Action Name	Enter the name that you want to appear in the Actions drop down list.
Action Category	Select an action category to associate the action with. You must associate an action with an action category so that it appears on the Actions drop down list.
Display Template ID	Select a display template to be used for the action. This field is hidden if the component for display template is not defined in the action category.
Set Control Value	Select a set control value. This field is hidden if the Set Control option in the Action Category field is set to *None*.
Category Value	Select a category value. Available category values are determined by the selected set control value.

Viewing an Action's Associated Transaction Groups and Dynamic Grids

Access the Related Transaction Group and the Related Dynamic Grid pages. Actions are associated with transaction groups and dynamic grids in the Transaction Group and Dynamic Grid pages. The transaction groups and dynamic grids to which the action is associated will appear on the Related Transaction Group and Related Dynamic Grid pages for your reference. An action can be associated with no transaction groups or dynamic grids, or one, or more than one.

See Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 279.

See Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 259.

Defining Transaction Groups

Access the Transaction Group page.

Transaction Group page

| **Transaction Name** (transaction group name) | The transaction group is the set of transactions that is available in the 360-Degree View. |

Related Actions

Order	Specifies the order in which the Actions will be displayed in the drop-down.
Action Name	Select an action from the list of those that are available.
	You can insert a *separator* action to indicate actions that do not transfer the agent to another page. At run time, the separator action appears as a dotted line in the drop down list. For example, the system supplies a separator action in the Support Transaction Group. The sample action Add Case - Contact Updated will be added below this separator action.

	Note the dotted line entry {– – – – – – – – }. This is not an action but a text separator for the run time drop down list. As delivered, the separator divides the actions that transfer the agent to another component—the first group of actions—from those that don't. If you want to preserve this distinction, place new actions above or below the separator as appropriate. You can't delete the separator, and at run time, the user can't select it.
Disable for Inactive BO	Select to disable actions for business objects that are specified as *Inactive* on the page. A worker who is no longer employed is an example of an inactive object.
Default	Specifies the default actions for the drop-down.
Status	Specifies whether the action is *Active* or *Inactive.* The default is *Active.* Only active actions are displayed in the drop-down list box.
Add Action	Click to append a new action row to the list of related actions.

Setting Up the 360-Degree View Tree

To set up the 360-Degree View Tree, use the Define Node (RB_TD_NODE), Set Up Tree (RB_TD_TREE_DEFN), and Define Dynamic Grid (RB_TD_DYNGRD) components.

This section lists prerequisites and discusses how to:

• Define nodes.

• View and access trees associated with the 360-Degree View node.

• Set up trees.

• Set up nodes.

• Test trees.

• Search for and view application packages.

Pages Used to Set Up the 360-Degree View Tree

Page Name	Object Name	Navigation	Usage
Define Node	RB_TD_NODE	Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node	Define nodes that you can use to configure the 360-Degree View Tree.
Related Trees	RB_TD_NDE_RELTOTRE	Set Up CRM, Common Definitions, 360-Degree View, Define Node, Related Trees	View and access tree names that are related to the 360-Degree View node.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define search criteria to associate to a node and component transfers for the grid.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the Define Node page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Set Up Tree	RB_TD_TREE_DEFN	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree	Define the tree configuration (images that appear in the tree, image size, page size, and date filter).
Tree Node	RD_TD_TREE_NDE	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node	Define the parent and child relationship of the tree nodes.
Test Your Tree	RB_TD_TREE_TEST	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree	Test the 360-Degree View tree to ensure that you configured it correctly.
Copy Tree As	RB_TD_TREE_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Tree, Copy Tree As	Copy an existing tree.

Defining Nodes

Access the Define Node page.

Define Node page (1 of 4)

Define Node page (2 of 4)

Define Node page (3 of 4)

Define Node page (4 of 4)

SubInteraction	Select a subinteraction that corresponds to the transaction that is associated with the tree node.
Root Node	Select if the node that you are defining is the root node.

Node Action

For each tree node, specify the node action. Node actions are:

Transfer	Transfers the user to a PeopleSoft CRM component and page that you define.
	If you select *Transfer*, use the Navigation, Market, and Action Mode fields to select where you want the transaction to transfer.
	Define the transfer fields using the Component Navigation component.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook,* "Defining Control Values for Business Objects," Defining Component Transfer Navigation.

Market   Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market, thus adding context to the node information.

Action Mode   Select the mode in which to open this page for the transaction. Values are *Add, Correction, Update,* and *Update/Display All.*

Portal Content Reference   Select to transfer to a PeopleSoft CRM portal page that you define.

                                      If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.

Application Class   Select to call a PeopleSoft CRM application class.

                                      If you select Application Class, use the Class ID, Class Path, and Method Name fields to enter the application class that you want the system to call.

Package Tree Viewer   Click to search for and view the available application packages that PeopleSoft CRM provides. When you click this link, the Application Packages Lookup page appears. The information that you select on this page appears on the Define Node page after you click OK.

Dynamic Grid   Click to associate a dynamic grid to the node.

Grid ID and **Related Grid ID**   Defines the name of the primary grid and its related secondary grid. Prompts display the available Dynamic grids.

                                      If you have specified a Related Grid, you must select values in the fields under the No Context Selected Message, No Related Rows Found Message, and Search Fields for Related Grid sections.

No Context Selected Message   Select a message to display in the secondary grid when no rows are selected from the Dynamic grid.

No Related Rows Found Message   Select a message to display in the secondary grid when no rows are found for the selected row in the Dynamic grid. Select a message from the Message Catalog.

Search Fields for Related Grid   Click the Add Search Field button to create a grid list of the search fields that are common to the primary and secondary grids that must be used to retrieve data in secondary grid. You must specify these fields if you have a related grid.

None   Indicates that no action is associated with the node.

Node Type

The fields in this section enable you to define the node type.

Placeholder and **Placeholder Type**   Select to indicate that this node is represented as a placeholder on the 360-Degree View tree.

                                      Specify the placeholder type. Values are:

                                      • Add Node

                                        Select to have the tree node represent an add node.

• Folder

  Select to indicate that the tree node is a placeholder that is represented by a folder.

• Search Node

  Select to have the tree node represent a search node.

• View All

  Select to have the tree node represent a view all node. This applies only to the dynamic grid action on the node.

Disable for Inactive BO (disable for inactive business object)	Select to prevent the action from being performed on business objects that are inactive.
View	Select to define the information that appears in this node, then provide values for the following fields.
View Name	Enter the view name that is associated with this node.
Key Field 1 and **Key Field 2**	Enter key fields for the view.

> **Note.** These fields must appear as the first part of the key structure: RB_TD_360_SBR. Additionally, the view should include the RB_TD_360P_SBR and RB_AUDIT_SBR subrecords in any order.

Fields to Display	Indicate the fields that appear and the order in which the fields appear.
	When appearing under the node of the 360-Degree View tree, view information is divided into two sections. The first section can contain 20 characters, and the second can contain 30 characters. Specify which fields you want to appear in which sections, and in what order. Also, you can specify how the information is sorted.
	The two sections are separated by a hyphen. If two or more fields appear in one section, those field values are separated by a colon. For example, under an Orders node, you might see this information coming from a view: 2002-09-20 - Pending:d0e5061fcc. In this case, the capture date is defined for the first section, and the status code and capture ID is defined for the second section.
Sequence	Enter a number in sequence. This number defines the order in which the fields appear in the different sections for the node.
Display	Select to have this field appear for the node on the customer 360-Degree View tree.
Display In	Select the section in which to display this field. Values are *First, Second,* and *No Display.*
Display Length	Enter the length of the field.
Display Value	Select the value that appears for this field. Values are: *Long Translate, Related Display, Short Translate,* and *Value.*
	If you select *Related Display,* use the Use SetID, Record Name, and Column Name fields on the Related Field Details tab to select the related field details. One of the fields of the record entered should include the selected field in

	the node view. If the value selected is based on setID, the node view should have a key field 2 of *SETID* or *BUSINESS_UNIT.*
Order By Details	Select for the fields by which you want to sort the information. Then use the Order Sequence field to select how you want to sort the information. Values are *Ascending* and *Descending.*
EIP - (Synchronous)	Select to indicate that the information that appears in this node is gathered from a PeopleSoft EIP.
	If you select this option, you must specify the EIP information and define how the information is to appear on the 360-Degree View tree.
Class ID, Class Path, and **Method Name**	Enter the application class information for this EIP. The method that your assign here is used to create the request message and populate the node with the requested information.
Request Message	Enter the application request message for this EIP.
Response Message, Key Field 1, and **Key Field 2**	Enter the response application message for the EIP and its keys.
PeopleCode	Select to indicate that the information that appears in this node is gathered from executing PeopleCode
	If you select this option, you must specify the application class ID and method name.
Class ID, Class Path Like, and **Method Name**	Enter the application class information for the PeopleCode class.
Record Name	Enter the record name that contains the data.
Key Field 1 and **Key Field 2**	Enter the key fields for the record name.
Fields to Display	The group boxes for EIPs and PeopleCode is the same as the Fields to Display group box for Views. Use these fields to control how the information appears under the node of the 360-Degree View tree that is associated with an EIP.

Viewing and Accessing Trees Associated With the 360-Degree View Node

Access the Related Trees page.
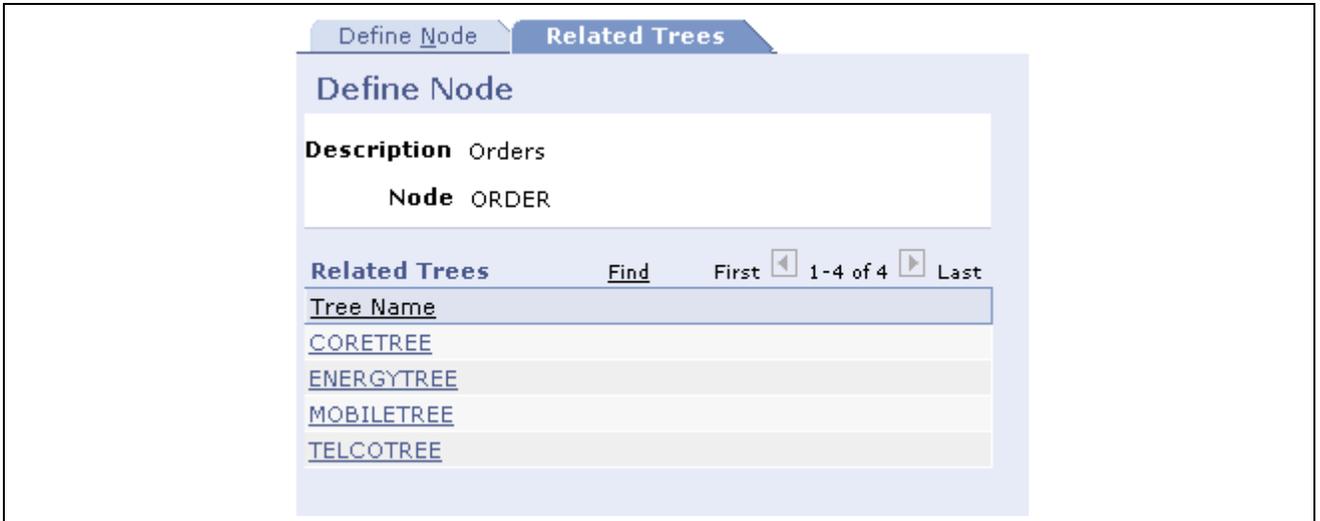
Related Trees page

Use this page to view and access the trees that are related to the node being set up for the 360-Degree View.
Click the link under the Tree Name field to access the Set Up Tree page.

Setting Up Trees

Access the Set Up Tree page.
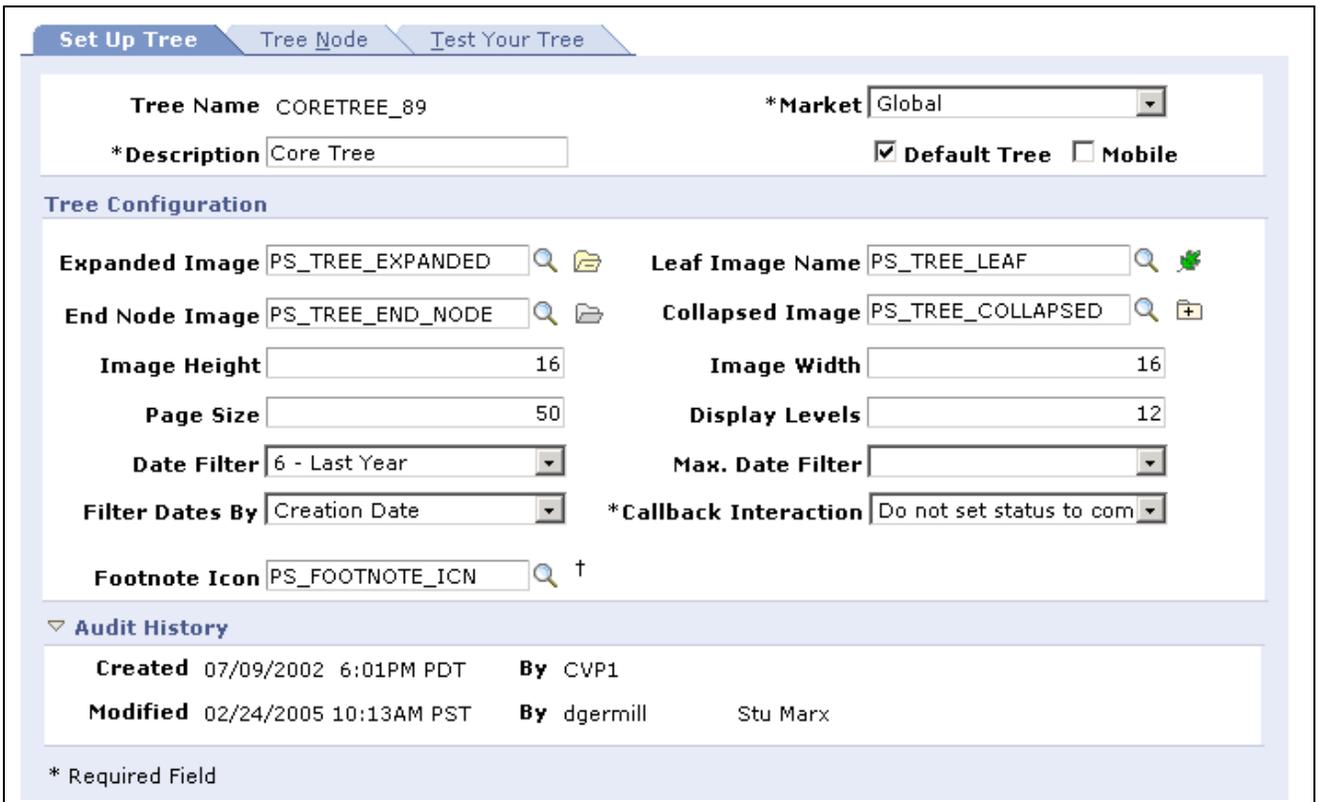
Set Up Tree page

Market	Select the market with which to associate the tree.

Default Tree

Select to make this tree the default tree for the market selected above on the 360-Degree View. Select this check box to make this tree the default tree for the market selected above. This tree will then appear on the 360-Degree Views that are associated with this market. If you do not make this tree the default, the user might not be able to see any tree in the Activities section.

Mobile

Select if the mobile 360-Degree View is going to use this tree.

When you select this check box, several of the fields on the page no longer apply because the PeopleSoft CRM Mobile application 360-Degree View has less capability than the 360-Degree View. For instance, mobile doesn't use images and has a limited page size.

Tree Configuration

Expanded Image, Leaf Image Name, End Node Image, and **Collapsed Image**

Enter the images that appear on the tree. The image appears in the Image Preview half of the group box. Leaf Image is used as a default leaf image of the node.

Image Height and **Image Width**

Enter the size of the image that appears on the tree. The default size is 16 by 16.

Display Levels

Enter the number of levels up to which the 360-Degree View tree is configurable.

Page Size

Enter the page size for the 360-Degree View tree. This is the size of the HTML area where the 360-Degree View tree appears on the 360-Degree View.

Date Filter

Select the filter for the tree. Values are:

- *1 - Today*
- *2 - Yesterday*
- *3 - Last Week*
- *4 - Last 2 Weeks*
- *5 - Last Month*
- *6 - Last Year*
- *7 - View All*

Note. All date filters include the values for today. For example, select *2 - Yesterday* to show information that is related to today and yesterday.

Max. Date Filter (maximum date filter)

Select the maximum date filter, which is used as a restriction against the date field that the user actually enters.

The system always looks at this filter when determining the information that appears on the 360-Degree View tree, regardless of what the user specifies in their date personalization settings.

If this filter is not set, and if you select View All in the date personalization on the 360-Degree View, and if you select Enable Filtering on Date Range, then the system populates the start date with 01/01/1900 on the 360-Degree View.

Filter Dates By	Select either *Creation Date* to filter dates by the entity's creation date or *Last Modified Date* to filter dates by the entity's last modification date.
Callback Interaction	Select how the system should set the status of an interaction when a user clicks the Finish Interaction button. Values are *Set Status to Complete* and *Do not Set Status to Complete*
Footnote Icon	Select an alternate symbol to indicate a footnote in the 360-Degree View. The system defaults this field to the *dagger* symbol. As an alternative symbol, you can select two asterisks (**). The footnote itself appears next to a node and indicates that the date filter is not applied to the node data.

Setting Up Nodes

Access the Tree Node page.

Tree Node page

Tree Node	Select the child node for the 360-Degree View tree.
Parent Node	Select the parent node under which this child node appears in the 360-Degree View tree.
Status	Select the tree node's status, either *Active* or *Inactive.* Only active nodes appear on the tree.
Sequence	Enter the order in which the child nodes appear on the tree. The sequencing is from low to high.

Node Parameters

Leaf Image   Select the image for the leaf. The image appears next to the field. If you leave this field blank, the system uses the default tree leaf image.

Display and **Fetch**   Enter the maximum number of rows that appear under the expanded node in the 360-Degree View. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks *View All* on the tree node.

                                  Note. If you leave this field blank, the system retrieves 1000 rows.

Display Folder as   Select whether you want the node to appear as a folder or a leaf.

Expand   Select to expand the nodes on the tree when the tree initially appears on the 360-Degree View.

Hide Node if No Children   Select to hide the node if there are no values. For example, if the customer has no cases, the Case node does not appear on the tree.

Apply Date Filter   Select to apply a date range to the activities for the given node. This is selected by default. If cleared, the date range criteria does not apply to that node.

Testing Trees

Access the Test Your Tree page.

Test Your Tree page

To test a tree:

1. Enter data into one or more of the fields in the Test Tree page region.

2. Click the Test Tree button.

   The system verifies the tree configuration and a preview of the tree appears in the Activities group box.

Searching for and Viewing Application Packages

Access the Application Packages Lookup page.
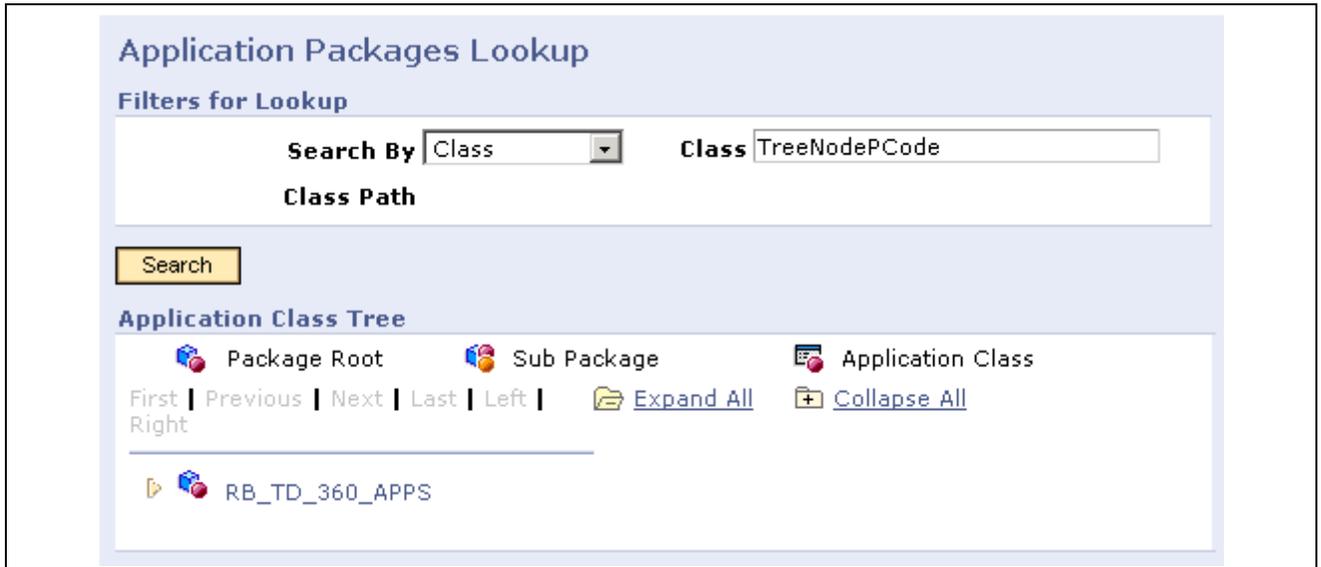
Application Packages Lookup page

Click any tree node to select the application class, then click OK. The system returns the information to the page from which you transferred.

Filters For Lookup

Select either Class or Class Path in the Search By field and enter either an application class ID or application class path.

Application Class Tree

The tree for the application class appears in this portion of the page.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Using Application Classes"

Configuring the 360-Degree View

To configure the 360–Degree View, use the Set Up Profile (RB_TD_PROF_SET) and Configure Role (RB_TD_ROLE_TREE) components.

This section discusses how to:

• Set up profiles.

• Configure roles.

• Define transactions with subinteractions.

• Specify nodes to capture subinteractions.

• Define dynamic grids.

• Relate actions to dynamic grids.

Pages Used to Configure the 360-Degree View

Page Name	Object Name	Navigation	Usage
Set Up Profile	RB_TD_PROF_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile, Set Up Profile	Define a profile that appears on the 360-Degree View.
Configure Role	RB_TD_ROLE_TREE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role	Configure tree information for a role.
Transaction Sub-Interactions	RB_TD_SUB_TRANS	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions	Define the transactions for which to capture subinteractions.
Node Sub-Interactions	RB_TD_SUB_NODE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions	Define the nodes for which to capture subinteractions.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define the grid on which transaction information appears.
Action Category	RB_TD_ACT_CAT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category	Define categories in which to group actions to display on the Action drop down.
Related Actions	RB_TD_DYNGRD_ACT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Related Actions	Relate actions to dynamic grids.

Setting Up Profiles

Access the Set Up Profile page.

Set Up Profile page (1 of 3)

Set Up Profile page (2 of 3)

Set Up Profile page (3 of 3)

Column Layout	Select the column layout for profile display.
Profile Type	Select *Customer Profile, Financial Profile,* or *Other.* This field controls the information that is available for inclusion in profile data.

Application Class Path

Package Tree Viewer	Click to search for and view all of the application packages that PeopleSoft CRM provides. See Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 271.

Description

Market	Specify the market with which to associate this profile. A component is uniquely identified by its name and its market association.
Default	Select to set this profile as the default profile for this market.

Profile Fields to Display

Use the Add icon (+) to define multiple fields for the profile section.

Record and **Field Name**	Enter the record and field name that you want to appear in the 360-Degree View Profile group box.
Editable	Select the Editable check box to allow an agent to update the field's value.

> **Note.** In this release, you can apply the Editable feature only to these fields: FIRST_NAME, LAST_NAME, EMAIL_ADDR, ADDRESS_PHONE, and EXTENSION. Also, profile fields for PeopleSoft Enterprise HelpDesk for Human Resources are not editable because the profile information resides in the Human Resources database.

Label ID	Enter the label ID for this field in the Profile group box.
Label Type	Select whether you want the *Long Name* or *Short Name*to appear for this field in the Profile group box.
Method Name	Enter the name of the method that fetches the data from the record that you have specified. This method comes from the application class defined Application class path section.
Display Row	Enter a number to indicate the fields horizontal placement in the Profile group box relative to the other fields. Be sure that you take into account the number of Display columns when you plan the layout of the fields in the Profile group box.
Display Column	Select *First Column* (left side) or *Second Column* (right side) to indicate the field's vertical placement.

> **Note.** If you want to move the Address field from the default first column to the second column, additional code change is required.

First Button Details and Second Button Details

Use the fields in these sections to define the buttons in the 360-Degree View Profile group box. You can use these two to add any drill down actions like transferring to a transaction or opening a 360–Degree View page for the parent business object.

You can specify one, two, or no buttons. If there are any editable fields in the profile, the system automatically displays the Apply Changes button.

Class ID, Class Path, and **Method Name**	Enter information to locate and identify the method that is executed when a user clicks the first or second button in the 360-Degree View row.
Image Name	Select a button image from the lookup list.
Display Image	Select to enable the button's display.
Image Tool Tip	Select an appropriate label for the popup tool tip.

Configuring Roles

Access the Configure Role page.

Configure Role page

Role Name	Select a PeopleTools role.
Transaction Name	Select the transaction group that you want to associate with this PeopleTools role.
	See Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 259.
Tree Name	Enter the tree that you want to associate with this PeopleTools role.
	See Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 267.
Profile	Enter the profile that you want to associate with this PeopleTools role.
	These profiles are available as system data:
	• COMPR (Communications Profile).
	• CORE (Core Profile).
	• ENGPR (Energy Profile).
	• FSIPR (FSI Profile).
	• INSPR (Insurance Profile).
	• HRHD (HR Help Desk Profile).
	• WRKER (Worker profile).
	See Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 272.
Sequence Number	Enter a number that the system uses to determine which role information appears by default on the 360-Degree View when the user has more than one role in the system.

For example, if a user has the PeopleSoft User role with sequence number 20 and the Support Manager role with sequence number 10, then the information that is related to the Support Manager role is used to initially populate the 360-Degree View because it has the lowest sequence number.

The user can change the role that appears.

View Type   Select the type of view for this role. Values are:

- *Customer*

- *Partner*

- *HR HelpDesk Worker*

- *Worker*

The system uses the view type to determine the role and related information that appears in the 360-Degree View. If the view type has any of the above values, the system selects only the role with the specified view type having the lowest sequence number.

For example, a user has the PeopleSoft User (sequence number 10, view type of Customer), HR HelpDesk Agent (sequence number 20, view type of HR HelpDesk Worker), Support Admin (support administration; sequence number 25, view type of Customer), and IT HelpDesk Agent (sequence number 30, view type of Worker) roles. When launching the 360-Degree View from Case, if the view type is *Worker,* then the system selects the IT HelpDesk Agent role and shows the HelpDesk tree with HelpDesk Profile information. If the view type is *Customer,* the system selects the PeopleSoft User role because it has a sequence number less than that of the Support Admin role.

Financial Account Grid   Check this option to display a customer's accounts

Policy Grid   Check this option to display a customer's policies.

Defining Transactions with Subinteractions

Access the Transaction Sub-Interactions page.
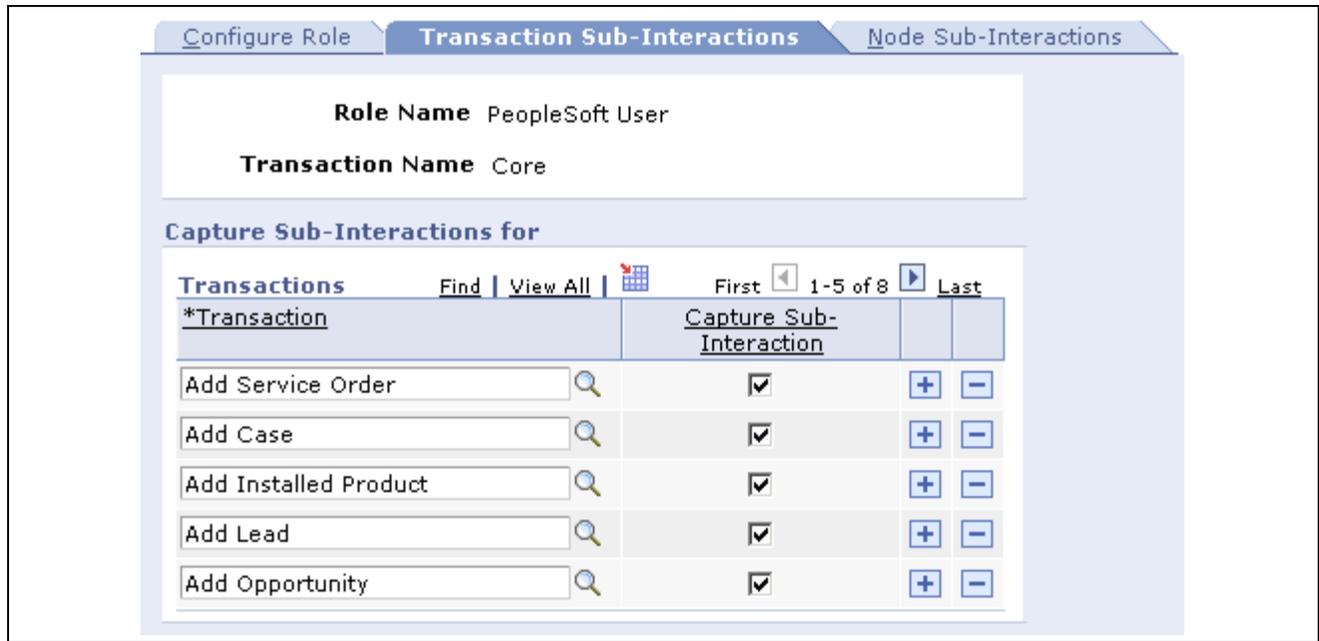
Transaction Sub-Interactions page

When you access this page, all transactions that are associated with the transaction group appear.

Capture Sub-Interaction   Select to enable the corresponding transaction to capture subinteractions for this role.

Specifying Nodes to Capture Subinteractions

Access the Node Sub-Interactions page.
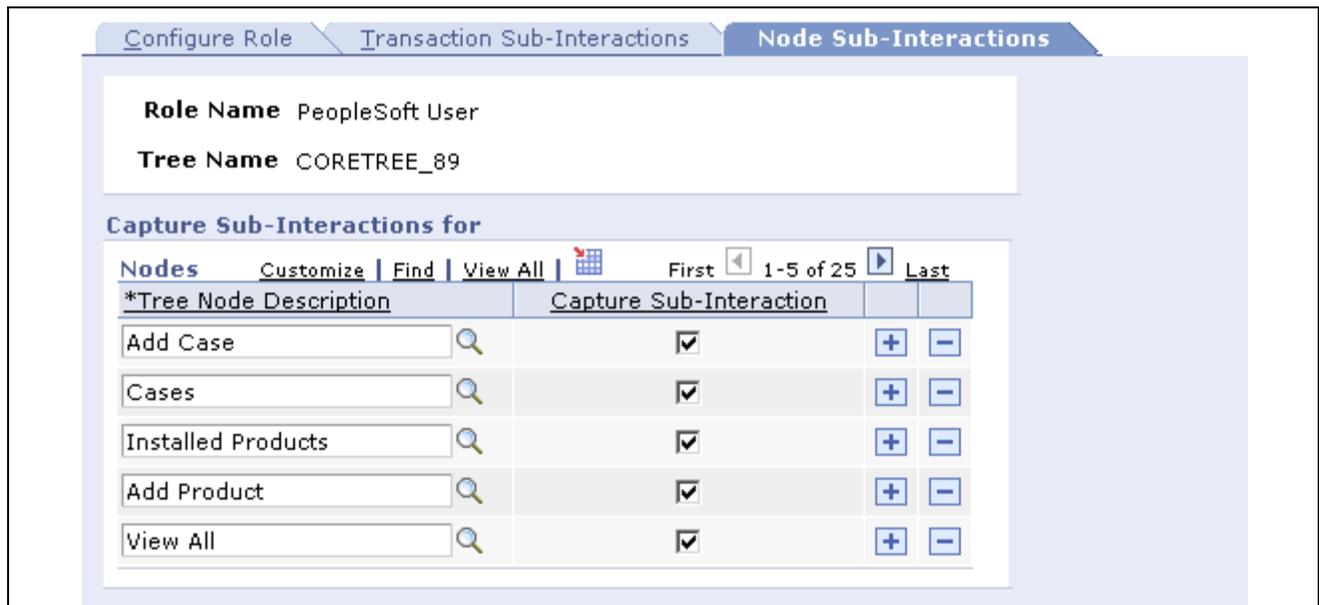
Node Sub-Interactions page

When you access this page, all tree node descriptions that are associated with the tree appear.

Capture Sub-Interaction   Select to enable the corresponding tree node to capture subinteractions.

Defining Dynamic Grids

Access the Dynamic Grid page.

Dynamic Grid page (1 of 2)

Dynamic Grid page (2 of 2)

Retrieval Type

Specify either the database view or the application class that is the source of the data that populates the dynamic grid.

View and **View Name**	Select to indicate that the data source is a database view. Enter the name of the database view that holds data that is returned by the database view.
Application Class	Select to indicate that an application class runs to provide the data that appears on the dynamic grid.

Record Name	Enter the name of the record that holds data that is returned by the application class method.
Class, Class Path, and **Method Name**	Enter the application class information for this application class. The method that your assign here is used to create the request message and populate the node with the requested information.
Package Tree Viewer	Click to locate an application class.

Grid Information

Enter data that names the grid and describes its appearance.

Grid Keys

Field Name	Enter the name of the field that the system uses as a key when transferring to another component.
Sequence number	Enter the sequence of the key.

Grid Field

Enter information that describes each field that appears in the grid. Add fields using the Add a new row (+) button.

Field Name	Select the name of the field whose values you want to appear in the grid. Available fields are based on the view name or the record name selected in retrieval type section.
Display Type	Select one of the following to indicate how the Field Name value will be displayed on the grid:

- *Hyperlink*

  Select to enable the user to initiate the transfer by clicking on the field value text.

- *Long Translate*

  This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.

- *Others*

  Select this option to display the value as read-only.

- *PushButton*

  Select to make the field appear as a button that initiates the transfer.

- *Related Display*

  This option is for the display of a custom element.

- *Short Translate*

  This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.

Label ID	If you want the field to be displayed by its label, select *Field Label ID*.

Label Type	If you selected Field Label ID, indicate if you want to display the *Long Name* or *Short Name* for the field label.
Sequence number	Enter the a number *1* or greater number to indicate the position of the text field in relation to the other text fields you define.
Description	The system displays the text description specified for the Label ID field. It is not editable here.

Relating Actions to Dynamic Grids

Access the Related Actions page.
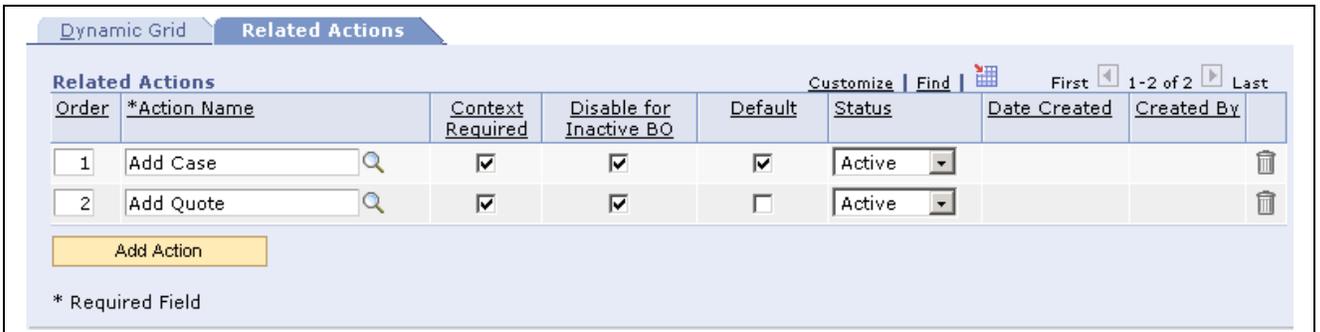
Related Actions page

Order	Enter the number *1* or a greater number to indicate the order in which you want the action to appear in the Actions drop-down list at the top right corner of the dynamic grid page.
Context Required	Select if you want the system to require the user to select a row from the grid when selecting this action. The context itself is specified in the action category to which the action belongs.
	When the user clicks the Go button for the Action drop-down list box, the default values defined in the actions are made available in a global record along with the selected rows in the grid. The system then triggers the method associated with the action category.
	See Chapter 18, "Setting Up the 360-Degree View," Defining Action Categories, page 253.
Disable for Inactive BO	Select to prevent the action from being performed on business objects that are inactive.
Default	Select to display the action in the drop-down list.
Status	Select *Active* or *Inactive.* The default is *Active.* Only *Active* actions appear in the Action drop-down list box.

Configuring the 360-Degree View Search Page

To configure the 360-degree view search page, use the User Links (RB_TD_ANON_LINKS) and 360-Degree Search Preferences (RB_TD_USRSRCHPREF) components.

This section provides an overview and discusses how to:

• Define user links that appear on the search page.

• Select the search page that is used to access the 360-Degree View.

Understanding 360-Degree View Search Pages

360-Degree View search pages use the customer identification framework to identify the customer or worker whose information appears on the 360-Degree View. Different 360-Degree View search pages are defined for each of the PeopleSoft CRM industry solutions or markets. You can control which search page a user accesses by setting the user's market preferences.

Additionally, you can create user links (which you click to access a component) that appear on these search pages.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Customer Identification

Pages Used to Configure the 360-Degree Search Page

Page Name	Object Name	Navigation	Usage
User Links	RB_TD_ANON_LINK_PG	Set Up CRM, Common Definitions, 360-Degree View, User Links, User Links	Define user links that appear on the 360-Degree Search page.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the User Links page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Search Preferences	RB_TD_USRSRCHPREF	Set Up CRM, Product Related, 360-Degree View, Search Preferences, Search Preferences	Select the search page that you use to access the 360-Degree View.

Defining User Links That Appear On the Search Page

Access the User Links page.

User Links page (1 of 2)

User Links page (2 of 2)

Note. Currently, PeopleSoft CRM provides predefined user links for the search pages in the government and financial industries.

Base Market	The base market where this user link applies.
Component Name and **Page Name**	The component and page where this set of user links appears.
Description	The description for this set of user links.

User Links

Define each user link that appears on the search page.

Sequence	Enter a number that the system can use to determine the order in which the user links appear on the page.
Active	Select the status of the user link, either *Active* or *Inactive*. Only active user links appear on the page.
Link Name	Enter the link name. This appears on the page as the user link.

For each user link that you define, select the option that defines the action taken when the user clicks the link. Actions are:

Transfer	Select to have the user link transfer to a PeopleSoft CRM component and page that you define.
	If you select Transfer, use the Market, Menu Name, Menu Bar Name, Item Name (component name), Page Name, and Mode fields to select where you want the user link to take you.
Application Class	Select to have the user link calls a PeopleSoft CRM application class.
	If you select Application Class, enter the Class, Class Path Like, and Method Name fields to define the application class that the system to call.
Package Tree Viewer	Click to access the Application Packages Lookup page to search for and view the available application packages that PeopleSoft CRM provides. The information that you select on this page appears on the User Links page after you click OK.
	See Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 271.
Portal Content Reference	Select to have the user link transfer to a PeopleSoft CRM portal page that you define.
	If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.

Selecting the Search Page That Is Used to Access the 360-Degree View

Access the Search Preferences page.
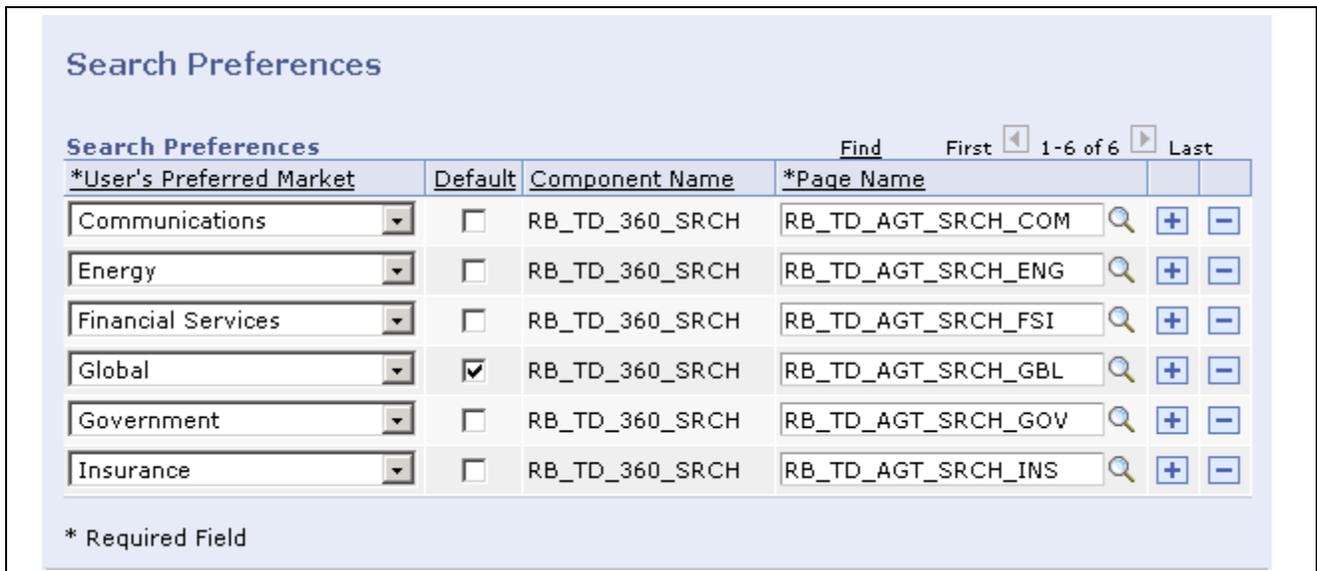
Search Preferences page

Select the default search page that you want to use to access the 360-Degree View for the different markets. You can define a different search page to access the 360-Degree View for each market.

The system checks the user's preferences to determine the market that is associated with that user and then uses the search preferences that you define on this page to determine the search page that appears when users access the 360-Degree View. If you do not define a market value for the user on the user preferences page, the system uses the search page that is associated with the Global market from this page.

Note. The search preference defaults to the search page that is associated with the Global market.

User's Preferred Market   Select a preferred market if it is not already shown on the page.

Default   Select to indicate the page that you want the system to display in the selected
                                 row when no market preference exists for the user.

CHAPTER 19

Using the 360-Degree View

This chapter provides an overview of 360-degree views and discusses how to:

• Access the 360-Degree View pages.

• Manage overall activity for a business object.

Understanding the 360-Degree View

This section discusses:

• 360-degree views.

• 360-degree view toolbar.

360-Degree Views

360-degree views provide a summary view of overall activity for a business object—a customer, contact, partner, or worker. From a 360-degree view, you can review or initiate transactions, record interactions and subinteractions, view relationships, and view tasks for the business object.

A 360-degree view page includes these page regions:

Region	Details
Role	This drop-down field lists the roles that are associated with the business object whose information appears on the page. You can select a role to filter data and transactions so that only those that pertain to that role appear in the view. See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Understanding Business Object Relationship Model Components".
Actions	This field lists the transactions that are defined for the 360-Degree view page. Select the transaction to perform the associated actions or to transfer to the page that performs the desired actions. Transactions populate relevant fields on the transaction page from the data that is identified on the 360–Degree View page. See Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 252.

Region	Details
Summary	Information such as name, contact information, and customer value appears here. The Summary page region can include up to two buttons that transfer to components that contain more information about the business object. Users can modify the person's or company's phone and email data in the CRM database from this section.
Activities	Activities appear in a tree format that contains a record of all transactions, interactions, and subinteractions that involve the business object. Transactions are grouped under nodes. Select a node to view, add, modify, or search for a transaction.
	The specific nodes that appear on the Activities tree vary depending on the business object and role that you select.
	Interactions are grouped by date.
	See Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 260.
Date Filter	This field enables you to select a date range that controls which transactions appear in the tree.
\<activity\> Detail	The information that appears in this area changes depending on which node you select in the activities tree. Summary information about the transactions that are under the node that you select in the 360-Degree view tree appears in this grid.
	When you first access the 360-Degree View page, the system displays information that is controlled by the default setting that is specified for the page.
	See Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 260.
Log Interaction	Using this group box, you can capture interaction details, record the callback date and time, attach notes to the interaction, and send an email to the customer or internal personnel (if the email address is set up).
	See Chapter 17, "Working with Interactions," page 233.
Current Actions	This area lists all the transactions that occur during the current interaction or current 360–degree view session.
Relationship Viewer	All of the business object relationships for the customer are accessible from this page.
	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Working with the Relationship Viewer".

Region	Details
Tasks	This page lists all the tasks that pertain to the business object. You can drill down to view the task detail. See Chapter 23, "Working with Tasks," page 349.
Call Reports	This page lists all the call reports that pertain to the business object. You can drill down to view the call report detail. See Chapter 24, "Working with Call Reports," page 369.

The specific information that you see on a 360-Degree View page varies depending on whether you are viewing a customer, contact, site, partner, worker, or human resources help desk (HRHD) worker.

The system records all interactions with the business object and displays them in the Activities section of the 360-Degree View page. An interaction can contain multiple subinteractions. For example, a call with a customer might involve a case being updated, a service order being added, and a note about the customer. All of these subinteractions are logged under the same interaction.

The specific activities and transactions that appear in the Activity Tree page region and Actions drop down box differ depending upon which 360-degree view you access.

You can utilize these types of 360-degree views:

• Customer

  The customer 360-degree view is used to manage transactions and activities that relate to customers, sites, and contacts of customers.

• Partner

  The partner 360-degree view is used to manage transactions and activities that relate to partners and contacts of partners.

  See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*.

• Worker

  The worker 360-degree view is used to manage cases and interactions for workers who call the help desk for support.

  See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*.

• HRHD Worker (human resources help desk worker)

  The HRHD Worker 360-degree view is used to initiate transactions and manage activities that relate to the worker's human resources data. In addition to the sections that appear on all 360-degree views, the HRHD worker 360-degree view includes information about the worker's job and position, payroll information, and benefits.

  The HRHD 360-degree View page provides security that is based on section-level information only. There is no field-level security. For example, if an agent has access to information for one job and not the other, or the agent only has access to part of the information, the system still retrieves all job information. This enables a true 360-degree view of an employee.

  See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook* and Chapter 4, "Setting Up Security and User Preferences," page 43.

Using the 360-Degree View Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their own toolbar.

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

PeopleSoft Enterprise CRM delivers these buttons for the 360-Degree View toolbar:

	Click the Reload button to refresh the information that appears on the 360-Degree View tree.
	Click the New Search button to finish the interaction with the current customer and return to the Search page. Depending on the option that was selected for Callback Interaction when the tree was originally set up, the interaction status is either identified as *Completed* or left open for further activity with the customer.
	Click the Notification button to send a notification. See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications".
	Click the Correspond button to send ad hoc email correspondence. See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Sending Correspondence". **Note.** This button does not appear for the Company role.
	Click the Add to My Contacts button to add the selected contacts to the My Contacts list.
Return	Click to transfer back to the Contact 360–Degree View page from which you accessed the Company 360-Degree View. This button appears only if you transfer to the Company 360-Degree view by clicking 360–Degree view icon in the summary section of Contact 360–Degree View.
Personalize	Click the Personalize link to personalize the toolbar buttons.

See Also

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

Accessing the 360-Degree View

This section discusses how to search for customers in the 360-degree view.

Note. Only the Customer 360-degree view search page is discussed in detail. The search pages that are used to access other 360-degree views are similar in usage.

Page Used to Access the 360-Degree View

Page Name	Object Name	Navigation	Usage
Search For Customer	RB_TD_AGT_SRCH_GBL	Customer 360-Degree View, Search for Customer	Search for a customer whose information you want to view.
Search for Partner	RB_TD_AGT_SRCH_PRT	Partner 360-Degree View, Search for Partner	Search for a partner whose information you want to view.
Search for Worker	RC_HD360_SRH	Worker 360-Degree View, Search for Worker	Search for a worker whose information you want to view.
Search for Worker	RC_HRHD360_SRH	HRHD Worker 360-Degree View, Search for Worker	Search for a worker whose human resources information you want to view.

Searching for Business Objects in the 360-Degree View

Access the search page for a customer, partner, or worker.

Note. The Search for Customer page is shown for illustration purposes. The other search pages are similar in usage.

Search Customers page

Search

You can enter search criteria in any or all of the search fields. The system searches for business objects that match the criteria you enter.

Note. This search uses the customer identification framework.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Customer Identification.

Search Results

If more than one match for the search criteria that you enter is found, then all business objects that match the search criteria appear in the Search Results page region. If only one record matches the search criteria, then the 360-Degree View page for that object appears.

Search for Customer: Search Results page

For business objects that are contacts of either customers or partners, one row appears in the Search Results page region for each customer or partner that the individual represents. The Name column that appears in the row for an individual identifies the company that the individual represents, and the Consumer column identifies the consumer that the individual represents. If both the Name and Consumer columns in a row are blank, then the individual listed in the row is a consumer.

Select Action	Select a role to create from the list of available roles.
	The system determines the available roles from the search criteria that you entered. For example, suppose that you enter a value in the Organization field, the available role is *Company,* but if you enter a value in either the First Name or Last Name field, the available roles are the roles that are associated with the individual business object type: *Create Company with Contact, Create Consumer,* or *Create Consumer with Contact.*
	To use this functionality, you must have previously set up Quick Create for that object. Once you create the new business object, the system transfers you to the 360-Degree View page automatically, using the newly created business object.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Searching for Business Objects

Managing Overall Activity for a Business Object

This section discusses how to manage overall information for a business object.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Working with the Relationship Viewer"

Pages Used to Manage Overall Activity for a Business Object

Page Name	Object Name	Navigation	Usage
360-Degree View	RB_TD_AGENT_VIEW	• Customer 360-Degree View, Search for Customer Select an existing customer. • Partner 360-Degree View, Search for Partner Select an existing partner. • Worker 360-Degree View, Search for Worker Select an existing worker. • HRHD Worker 360-Degree View, Search for Worker Select an existing worker.	Manage overall activity for the business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Access the 360-Degree View page. Select the Relationship Viewer tab.	View the relationships for the business object whose information appears on the 360-Degree View page.
360-Degree View - Tasks	RB_TD_TASK_LIST	Access the 360-Degree View page. Select the Tasks tab.	Maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page.
360–Degree View - Call Reports	RD_TD_CR_LIST	Access the 360–Degree View Page. Select the Call Reports tab.	Maintain the call reports that are associated with the business object whose information appears on the 360–Degree View Page.

Managing Overall Activity for a Business Object

Access the 360-Degree View page.

360–Degree View page

Role	Select a role that is listed for the customer, partner, worker or contact. The profile changes to reflect data that is relevant to that role.
Actions	Select the action that you want to perform from the 360-Degree View. Delivered values are *Add Case, Add Defect, Add Install Product*, *Add Lead*, *Add Opportunity, Add Order*, *Add Quote*, *Add Service Order*, *Installed Product Hierarchy*, *Add Quote, Add RMA* (return material authorization), and *Product Registration* for the core transactions.
Phone, Email, and **Extension**	Enter new data to update customer, partner, worker, and contact profile information. Click the Apply Changes button to enter and permanently update the changes.

Note. Updates to HRHD Worker profiles are made in the CRM database; they are not sent to the HR database.

Activities

This region contains the 360-Degree View Tree, which displays all activities and interactions with the customer.

Activities are grouped by transaction type. Expand the folder or icon next to a transaction type to view activities for that transaction type.

Depending on the way the system is configured, you can add transactions or search for transactions of a particular type. Click a detail link to access transaction detail or click the activity summary to view a grid that lists summary information about the transactions.

Date Filter	Select the date filter for the activities that you want to view. Values are *1 - Today, 2 - Yesterday, 3 - Last Week, 4 - Last 2 Weeks, 5 - Last Month, 6 - Last Year,* and *7 - View All.*
	If you select *6 - Last Year* and the tree header has a maximum date filter of *5 - Last Month,* the system stops the user from viewing records that are older than the maximum date filter criteria.
	If you select *7 - View All* and you don't enter maximum date filter criteria in the tree header, the system displays all of the records.
	When the 360-Degree View page initially appears, the date range that you specify in the profile of the user who is currently accessing the system appears by default. If the user's profile is not available, the system displays the activities for the date range that you specify in the tree. When defining the tree, you specify the date filter and maximum date filter to use when displaying this page.
	See Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 260.
From and **Through**	Enter the date range for the information that you want to see on the 360-Degree View. After you enter the date range, click the Go button.
	Note. The system displays the From and Through fields on this page only after you enable data filtering on the 360-Degree View - Personalize page.

Activities Detail

The system displays a dynamic grid that lists key information from the most recent transactions and associated actions for the activity type that you click in the 360-Degree view tree.

The label for this grid changes depending on the type of information you view. For example, when you expand the Agreements node in the 360-Degree view tree, and then click the Active child node, the system displays the Agreements-Active dynamic grid and shows important information from agreement records. It can also provide an action link for further interactions concerning an agreement, such as viewing its details. You can configure the associated actions, the number of transactions, and the columns that appear in this grid.

See Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 279.

Log Interaction Note

The fields in the Log Interaction section capture the details of an interaction.

Every time that you record a subinteraction on this page, the system groups the subinteractions into one related interaction. You can perform multiple subinteractions for a customer at one time before you leave this page. The subinteractions that you created previously appear in the Current Actions group box.

Note. Interactions that are automatically generated through correspondence management are not related to the values in the drop-down menus on the 360–Degree View page. Interactions that are generated through correspondence management do not appear in reports that track which contact methods are used most often by agents for interactions with customers or contacts through the 360–Degree View page.

Contact Method	Select the contact method for the interaction. Delivered values include *Inbound Chat, Inbound Email, Inbound Fax, Inbound Phone, Inbound Web, Outbound Email, Outbound Fax,* and *Outbound Phone.*
Interaction Status	Select the interaction status. Delivered values include *Busy, Callback, Child Answered, Completed, Do Not Call Again, In Progress,* and *No Answer.*
Callback Date and **Callback Time**	Enter a date and time for callback.
Add Note	Enter a note to add to the interaction. The note is saved in the 360-Degree View Tree as a subinteraction.
Email Note	Click to send the note to the customer.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Person Business Objects"

Viewing Customer Relationships

Access the 360-Degree View - Relationship Viewer page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Working with the Relationship Viewer".

Maintaining Customer Tasks

Access the 360-Degree View - Tasks page.

See .

PART 5

Self-Service for Customers

Chapter 20
Setting Up Customer Self-Service

Chapter 21
Working with Customer Self-Service Transactions

CHAPTER 20

Setting Up Customer Self-Service

This chapter provides an overview of customer self-service features for PeopleSoft CRM Order Capture and discusses how to:

• Set up guest IDs to access self-service sites.

• Set up user registration features.

• Set up Contact Us features.

• Set up product registration.

Understanding Customer Self-Service Setup

This section discusses:

• Self-service sites.

• Self-service user registration.

• Contact Us notifications.

• Product registration.

Self-Service Sites

Several aspects of a self-service site are controlled by characteristics of the user ID that provides site access. When users first access a site, they are logged on to the site with a guest ID. This guest ID is specified in the site's configuration properties file or defined on the query string of the uniform resource locator that one uses to access the site. By setting up multiple guest IDs with different characteristics, you can create multiple self-service sites.

For example, you may want to create an English site and a Spanish site. Or you may want to create a European site that uses a European business unit, and a U.S. site that uses a U.S. business unit. You might even want to create multiple European sites that use different languages but that all point to the same European business unit. To accomplish all of this, create multiple guest IDs with the appropriate characteristics.

If you set up multiple guest IDs, the self-service sign in page enables users to switch between guest IDs. For example, if you set up guest IDs for different languages and use language names as IDs descriptions, then visitors can select from a list of languages. The system stores the label for the field that visitors use to select a guest ID in the message catalog to make it easy for you to change the label to suit your business needs.

Site Branding

You can create distinctive Web sites for your company's self-service sites by setting them up as branded sites. Use PeopleSoft Enterprise Portal Pack to quickly implement a portal with your own "look and feel," or branding.

See Also

PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Portal Pack"

Self-Service User Registration

A self-service user registers in one of these three ways, each of which is secured differently:

1. Existing customer.

   Customers who already exist in the system can add a self service user login for their account. To do so, they must enter information that you define to identify them as a current customer. After the system verifies their status, they must enter only a password to establish a self-service user ID. The system obtains other information from their existing customer record.

2. New customer.

   This is for new self service users who can be consumers or businesses. You must set up a guest account to handle each type of user that might register for self service because new user logins take their defaults from the guest account.

   Security is controlled by the privileges that you establish and assign to guest user IDs. A user first signs on using a guest ID that you provide. When the user registers, the system clones the currently active guest ID and all its access privileges to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

3. Contact of an existing customer company.

   A contact of an existing company can register as a business user who represents a customer company by entering a key that you define and provide to them.

To register, users are required to read and accept terms of service and a privacy policy that you set up.

User Passwords and Password Hints

A user can add a password hint question and answer when they register. This enables users who forgot their passwords to request new passwords after answering a hint question. A user can also change their password hint.

To enable this feature, you must set up forgotten password email text at the system level. Additionally, the user must:

• Have a primary email address.

• Establish a password hint during registration or through the Name and Sign In maintenance pages.

• Be associated with a permission list that permits the password to be emailed.

PeopleSoft CRM uses logic that is provides by PeopleTools to store the hint and answer, verify the hint that the user enters, and email the new password to the user.

See *Enterprise PeopleTools PeopleBook: Security Administration*

See Also

Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 84

Contact Us Notifications

Registered users (but not guest users) use the Contact Us page to send messages to you. When customers send messages, they select from a list of subjects and topics (subcategories of subjects) that you define to identify the message subject. When the customer submits the message, the system:

• Captures the message as an interaction that is visible through the 360-Degree View and other interaction lists.

• Notifies designated people that the message is submitted.

The system determines whom to notify based on the workflow action that you associate with the subject and topic of the message. The workflow action also determines whether notifications are sent to worklists or to email addresses.

Worklist notifications automatically include a link to the Interaction page; email notifications include a link only if the email template is so configured. The PeopleSoft-delivered CONTACT US FORM email template includes this link.

To take maximum advantage of interaction functionality, use the 360-Degree View to manage all follow-up communications. Using the 360-Degree View ensures that the system captures all follow-up communications as interactions. A direct email response bypasses the system and is not captured as an interaction.

Contact Us Chat

If the self-service page is enabled, , a registered self-service customer can request a live chat. This request opens the customer chat window, a browser-based window that does not require a client install or applet download.

Agents receive chat requests through the MultiChannel Console, which enables them to manage multiple simultaneous chat sessions. When an agent accepts a chat request, the agent chat window opens. Agents can conference peers and supervisors into the chat, and transfer chat sessions to other agents or queues. Agents can also initiate chats with other agents on their buddy lists.

See Also

PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Product Registration

Self-service users can register products online through PeopleSoft Customer Self-Service and 360-Degree View. When a customer signs in and selects to register a product, the system populates the Product Registration page with two lists:

• Existing products

  The Existing Products section of the Product Registration page lists installed products that are already registered and their registration dates. Users click a registered product link to update the registration information or select an unregistered product to register.

• New products

Contains product catalogs, a product list, or both. The customer uses these to locate the product to register.In addition to registering products that already have installed products that are created for them, users can also use product catalogs to register new products. Product catalogs group products in a hierarchical fashion, which provides simple navigation for users to locate new products. As an administrator, you select product catalogs from the system to appear in the New Product section of the Product Registration page. Users can then drill down on any listed catalog to look for the products they want to register without having to remember and enter product names. You can also set up new catalogs that are specific for product registration. When users submit the registration, the system creates new installed products with the *Installed* status for products that users select from the new product list. For registered products, users select from the existing product list. The system updates the associated installed products with the information (date of registration, serial ID, and so on) that it collects from the product registration. You can specify what installed product fields are available for display or editing on the Product Registration - Product Registration Details page. You can also configure the system to display only installed products of certain statuses. This enables you to limit the registration process to installed products for which product registration makes sense; for example, if you don't want users to register an installed product that is canceled or uninstalled. Only registered users can register products through PeopleSoft Customer Self-Service.

Note. If the quantity of an installed product is greater than one, and they are under different statuses, the installed product appears in the Existing Products section if any one of those statuses is in the status list that you specify on the Product Registration Setup page.

Product Registration Using the 360-Degree View

Customer service representatives (CSRs) can register products for customers through the 360-Degree View. CSRs can view and update any existing installed products or select *Product Registration* in the Go To field on the page to register products for customers who call them on the phone.

See Also

Setting Up Guest IDs to Access Self-Service Sites

This section discusses how to:

• Define guest IDs.

• Change the label of the guest ID selection field.

Defining Guest IDs

To define a guest ID:

1. Define the ID in the PeopleTools User Profiles component.

   Access the User Profiles component from PeopleTools, Security, User Profiles, User Profiles.

   On the General page, enter the language code that is associated with the ID. Anyone who logs on with a guest ID sees all of the pages that are in the associated language code.

On the ID page, enter the description that self-service users see in the guest ID selection field. For example, if you support multiple languages and you define language-based user IDs, the descriptions might be the language names.

See *Enterprise PeopleTools PeopleBook: Security Administration*

2. Establish the ID as a guest ID on the User Registration Setup page.

Access the User Registration Setup page from Set Up CRM, Security, Self Service, User Registration.

This is the step that makes the ID into a guest ID that allows personal and business user registration. That is, the self-service Sign In page enables users to select from IDs that have a user registration definition.

See Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 84.

3. Define preferences for the guest ID on the User Preferences page.

Access the User Preferences page from Set Up CRM, Security, User Preferences.

Select a default business unit and market for the guest. If you do not select a business unit, the system uses the default PeopleSoft Order Capture business unit (as established on the Order Capture Definition page).

See Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 77.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Defining Order Capture Business Units"

Changing the Label of the Guest ID Selection Field

To change the label of the guest ID selection field:

1. Access the message catalog from PeopleTools, Utilities, Administration, Message Catalog.

2. Look up message set number *18068,* whose description is *Self Service Common.*

3. Click Find and enter message number *19* in the search string.

   The field label text appears. The default is *Select a different site to browse.*

4. Enter an alternative label for the guest ID selection field.

   For example, if the guest IDs are for different languages, you might enter *Select a language.*

5. Save the changes.

Setting Up Contact Us Features

To set up contact us features, use the Contact Us Topic (SUBJECT_TABLE) and Contact Us Subject (SUBJECT_TOPIC_TBL) components.

This section lists prerequisites and discusses how to:

• Specify chat features for Contact Us pages.

- Define topics.

- Define subjects and Contact Us workflow.

Prerequisites

When customers use the Contact Us page to communicate with you, they select from a predefined list of subjects and topics. When they submit the message, the system sends a notification to a designated person. You set up this workflow for each subject and topic combination that you define.

Before you create subjects and topics, you must define the workflow actions and workflow email templates that are to be used for these notifications.

Customers can also elect to open a chat with a customer service representative if you have enabled the chat feature and specified a chat profile and agent popup for on the self-service page.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up PeopleSoft CRM Workflow," Defining Workflow Actions for Business Projects

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up PeopleSoft CRM Workflow," Defining Workflow Email Templates

PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Pages Used to Set Up Contact Us Features

Page Name	Object Name	Navigation	Usage
Chat Enabled Page Setup	RB_CHAT_ADMIN	Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup	Specify chat features for Contact Us pages.
Contact Us Topic	CONV_SUB_TOPIC_TBL	Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic	Define topics that customers select when requesting that you contact them.
Contact Us Subject	SUBJECT_TABLE	Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject	Define subjects that customers select when requesting that you contact them, and set up workflow for each subject.

Specifying Chat Features for Contact Us Pages

Access the Chat Enabled Page Setup page.

Chat Enabled Page Setup page

See Also

PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Defining Topics

Access the Contact Us Topic page.

Contact Us Topic page

Specify a topic and topic description. You associate the topics with Contact Us subjects to enable users to select the subject and topic for a particular Contact Us request.

Defining Subjects and Contact Us Workflow

Access the Contact Us Subject page.

Contact Us Subject page

When you define a subject, specify the associated topics and the workflow objects (a workflow action and email template) that the system uses to deliver the customer's request to a particular worklist.

Effective Date	Enter the effective date of the email template data.
Description	Enter a description of the subject (up to 36 characters).
Contact Us Topic	Select topics to associate with this subject.
Email Template	For each subject and topic combination, select the workflow email template that the system uses to create the text in its email notifications.
Workflow Action	For each subject and topic combination, specify the workflow action that the system uses to send a notification that alerts a worker to the newly submitted message.

Setting Up Product Registration

To set up product registration features, use the Product Registration (RF_PROD_REG_SETUP) table.

This section discusses how to set up product registration features.

See Also

Pages Used to Set Up Product Registration for Self-Service Users

Page Name	Object Name	Navigation	Usage
Product Registration Setup	RF_PROD_REG_SETUP	Set Up CRM, Product Related, Installed Product, Product Registration, Product Registration Setup	Configure the registration page for installed products.
Catalogs	RF_PROD_REG_SETUP2	Set Up CRM, Product Related, Installed Product, Product Registration, Catalogs	Select product catalogs that self-service users can use to search for and register products.

Configuring Installed Product Registration

Access the Product Registration Setup page.

Product Registration Setup page

Installed Product Statuses

Specify the statuses for which installed products (that belong to the self-service user) appear in the Existing Products section of the Product Registration page.

Note. Product registration setup is keyed to setID.

Status   Select the status for installed products to appear on the Product Registration page.

Registration Fields

Define the installed product fields that appear to self-service users on the Product Registration Details page and whether the fields are modifiable or read-only. The system uses this information as default values on the Installed Product page of the Product Definition component. When a product requires a different set of fields to appear to self-service users, you can override the default fields in the Product Definition component.

Name	Select the field to appear on the Product Registration Details page. Values are *Account Number, Agreement Code, Asset Subtype, Asset Tag, Authorization Code, Comments, Date Registered, Department, Distributor, Distributor Contact, Environment, Install Type, Item Shipping Date, Network, Operating System, Operating System Version, Order Date, Ownership, Physical Location, Platform, Purchase Date, Serial ID, Site ID,* and *User Interface.* The system uses this value as the name of corresponding fields that you see on the registration page.
Modifiable	Select to enable users to modify the corresponding field. Clear this check box for fields that need to be read-only when updating previously registered products on the Product Registration Details page. When registering a product for the first time, users can modify all fields except the product description and the registration date, whether or not you select this check box.

Specifying Registration Catalogs

Access the Catalogs page.
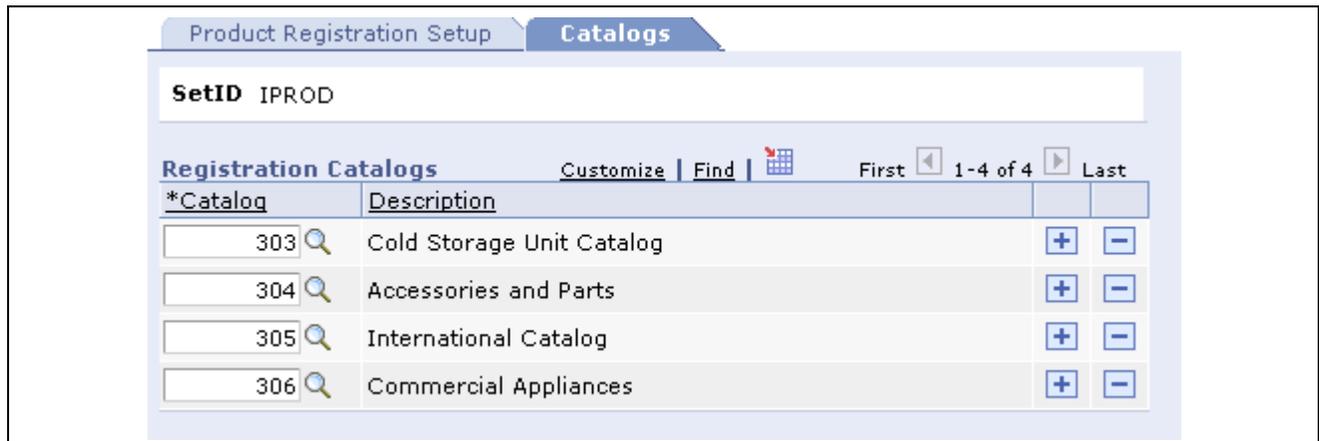
Catalogs page

Catalog	Select a product catalog that self-service users can access in the New Product section of the Product Registration page.

CHAPTER 21

Working with Customer Self-Service Transactions

This chapter provides an overview of customer self-service and discusses how to:

- Sign in to PeopleSoft CRM self-service.
- Register as a personal or business user.
- Select the customers that business users represent.
- Maintain name and sign-in information.
- Maintain contact information.
- Maintain contact address books.
- Maintain consumer contact and address information.
- Maintain consumer address books.
- View internal contacts.
- Send Contact Us messages.
- Register products.

Note. You can access several of the pages that are discussed in this chapter from the pagelets in PeopleSoft CRM Portal Pack.

See Also

PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook, "Working with PeopleSoft CRM Self-Service Pagelets"

Understanding Customer Self-Service

Self-service transactions enable customers to access information and transact business online. PeopleSoft CRM provides transactions for self-service users to:

- Register and sign in.
- Maintain their user profile (information about themselves and their relationship with you).
- Send messages to you or to chat live online with a customer service representative (CSR).
- Register products.
- Perform application-specific functions such as ordering products and submitting support cases.

This chapter describes how users register, sign in, maintain their profiles, contact you, and register products. It also discusses the differences between self-service for consumers (personal users) and for contacts (business users). Application-specific transactions are described in the corresponding application PeopleBooks.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Working With Order Capture Self Service"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Working with Self-Service Application Transactions"

Signing In to PeopleSoft CRM Self-Service

This section discusses how to sign in to PeopleSoft CRM self-service.

Pages Used to Sign In to PeopleSoft CRM Self-Service

Page Name	Object Name	Navigation	Usage
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Forgot Password	RX_EMAIL_PSWD	Click the Lookup Password Hint link on the Sign In page.	Request a password hint.
Forgot Password - Email New Password	RX_EMAIL_PSWD2	Click the Continue button on the Forgot Password page.	Answer a password hint question to complete the request for a new password.
Confirmation	RX_EMAIL_PSWD_CNFR	Click the Email New Password button on the Forgot Password - Email New Password page.	Confirm that passwords are reset and mailed.

Signing In to PeopleSoft CRM Self-Service

Access the Sign In page.

Sign In page

Returning Users

Enter the User ID and Password and click the Sign In button.

If you are already set up as a customer in the CRM system but do not have a self service sign-in, click the Create Sign In link to authenticate yourself as an existing user and create a new self service user ID and password.

New Users

You can register as a personal or business user.

Either personal or business user registration causes the system to create a user ID that is associated with the new consumer or contact record, which the visitor can use to sign in on subsequent visits. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearances depend on the user's role or roles.

Personal User Registration	Click this link to establish a personal user ID. When a site visitor registers as a personal user, the system creates a consumer record for that user.
Business User Registration	Click this link to establish an ID as a contact for a company that is already set up in PeopleSoft CRM. When a site visitor registers as a business user, the system creates a contact record that is associated with the customer that the visitor specifies. Visitors must provide customer codes and keys that their site administrators give them for authentication purposes.

Website

When users first access the site, they are automatically logged in using the guest ID that you identify in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access. Then, users can sign in with their own user IDs and passwords to further identify themselves and acquire additional access.

For example, users who accesses the site as guests can access the product catalog but cannot view order statuses. Once the users sign in, they can access both the product catalog and order statuses. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics such as the site language.

Select a website	Select a value to switch to a different ID. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics. You can change the delivered field label to more accurately reflect the guest ID options that you establish (for example, the Select a Location field with *United States, European Market,* and *Asia* values. If you have only one site, you can hide this section from the user).

See Also

https://www.peoplesoft.com/corp/en/login.jsp

Requesting New Passwords

Access the Forgot Password page.

To request a new password, enter your user ID and click Continue.

Completing Requests for New Passwords

Access the Forgot Password - Email New Password page.

You must correctly answer a personalized password hint question before the system creates and sends a new password.

Email Address	The system displays your primary address, which is the address to which the system sends the new password.
Email New Password	Click after entering an answer to complete the request.
	After you click this button, a confirmation page appears.

Registering As Personal or Business Users

This section discusses how to register as either a personal or business self-service user.

Pages Used to Register As Personal or Business Users

Page Name	Object Name	Navigation	Usage
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Personal User Registration	RX_REGISTER	Click the Personal User Registration link on the Sign In page.	Register as a personal user.
Business User Registration	RX_REGISTER_REPCHK	Click the Business User Registration link on the Sign In page.	Identify the company for a business user.
Register as a business user for \<company\>	RX_REGISTER_REP	Click the Continue button on the Business User Registration page.	Register as a business user.
Customer Registration	RX_REGISTER_CSTCHK	Click the Create Signin link on the Sign In page.	Register as an existing customer.
Customer Registration	RX_REGISTER_CST	Click the Continue button on the Customer Registration page.	Enter user ID and password information to complete the process of registering as an existing customer.
Partner Registration	RX_REGISTERPARTNER	Partner Registration	Register a partner company.
Registration Confirmation	RX_REGISTER_CNFRM	Click the Submit Registration button on the Registration page or the Register as a business user for \<Your Company\> page.	Review registration information.

Registering As a Personal User

Access the Personal User Registration page.

Personal User Registration page (1 of 2)

Personal User Registration page (2 of 2)

When you click the Submit Registration button, the system creates a new user ID and a new consumer record.

If a terms of service and privacy policy are set up for the self-service site, additional text containing links to these policies appears on this page. Be sure to read the terms of service and privacy policy before submitting the registration. By submitting the form, you are legally consenting to the terms in these documents.

Identifying Companies for Business User Registration

Access the Business User Registration page.

Business User Registration page

Set up keys on the Business User Registration Setup page. You give customers their company codes and keys, and they share the information with users whom they want to register under their company codes.

When a user registers, the new contact record is associated with the company that you specify on this page.

Note. When you set up a key, you can limit the number of times that it is used.

See Also

Chapter 4, "Setting Up Security and User Preferences," Registering Business Users, page 90

Registering As a Business User

Access the Register as a business user for <company> page. This page is similar in usage to the page for registering as a personal user.

See Chapter 21, "Working with Customer Self-Service Transactions," Registering As a Personal User, page 313.

Registering as an Existing Customer

Access the Customer Registration page.

Customer Registration page

If you already exist in the PeopleSoft CRM system as a customer or contact, you can register as a self-service user. You must enter information that identifies you to the PeopleSoft CRM system before you can complete the self-service registration process.

The fields that are available for entry on this page depend on how the user registration for existing customers is set up.

| **Continue** | Click this button to access a page where you enter sign in information, including user ID and password. |

Reviewing Registration Information

Access the Registration Confirmation page.

One of two buttons appears here, depending on what you were doing before you registered. Click Continue Shopping to access the product catalog. Click Checkout to go directly to the checkout page.

Selecting the Customers That Business Users Represent

This section discusses how to select customers.

Page Used to Select the Customers That Business Users Represent

Page Name	Object Name	Navigation	Usage
Customer Selection	CUST_SELECT	Customer Selection, Customer Selection	Select customers for the current session. This page is available for users that are set up as brokers who buy for multiple companies.

Selecting Customers for the Current Session

Access the Customer Selection page.

Customer Selection page

Select a customer from the Customer List.

Maintaining Name and Sign-In Information

This section discusses how to:

• Review name and sign-in information.

• Change names.

• Change passwords.

• Change password hints.

Note. This process is the same for consumers and contacts.

Pages Used to Maintain Name and Sign-In Information

Page Name	Object Name	Navigation	Usage
Manage Profile - Change Profile Info	RX_NAME_SIGNIN	Manage Profile, Change Profile Info	Review and edit name, password information, and privacy preferences.
Manage Profile - Change Name	RX_NAME_CHNG	Click the Change Name button on the Manage Profile - Change Profile Info page.	Update name information.
Manage Profile - Change Password	RX_PSWD_CHNG	Click the Change Password button on the Manage Profile - Change Profile Info page.	Enter passwords.
Profile - Change Password Hint	RX_HINT_CHNG	Click the Change Password Hint button on the Manage Profile - Change Profile Info page.	Enter password hints.
Manage Profile - Change Privacy Preference	RX_PREF_CHNG	Click the Change Preferences button on the Manage Profile - Change Profile Info page.	Select privacy options for screening communications.

Reviewing Name and Sign-In Information

Access the Manage Profile - Change Profile Info page.

Manage Profile - Change Profile Info page (1 of 2)

Manage Profile - Change Profile Info page (2 of 2)

Maintaining Contact Information

This section discusses how to maintain contact information.

Pages Used to Maintain Contact Information

Page Name	Object Name	Navigation	Usage
Manage Profile - Default Addresses	RX_PROFILE_DFLTS	Manage Profile, Default Addresses	Manage default mailing, shipping, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Update primary contact information.
Address Book - Create New Address, Address Book - Update Address	RX_ADR_CUST_ADDR	Click the Edit link for an existing address or the Add New Address button on the Profile - Contact Information page.	Create or update addresses that are associated with the user.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link for any non-primary address, phone number, or email address on the Profile - Contact Information page.	Confirm the deletion of the address, phone number, or email address.

Accessing Default Address Information

Access the Manage Profile - Default Addresses page.

Manage Profile - Default Addresses page

Updating Primary Contact Information

Access the Manage Profile - Contact Information page.

Manage Profile — Contact Information page

The Add New Address button transfers you to a page where you can add address information. The Add New Phone and Add New Email buttons add a new row to the Phone or Email grid for you to enter the new information. The user can edit their current phone numbers and email addresses directly on this page.

Maintaining Contact Address Books

This section discusses how to:

• Review customer addresses.

• Review customer contacts.

• Review customer primary information.

• Create customers or contact addresses.

• Create customer contacts.

• Select existing contacts.

• Select existing addresses.

• Maintain name, role information, and relationship address for customer contacts.

• Update customer or contact addresses.

Pages Used to Maintain Contact Address Books

Page Name	Object Name	Navigation	Usage
Address Book: View Addresses	RX_ADR_CUST_INFO	• Manage Profile, Address Book • Click the View Addresses link on the Address Book (View Contacts) page or the Address Book - Customer's Primary Information page.	Review addresses that are associated with the customer.
Address Book: View Contacts	RX_ADR_CUST_CNTCT	Click the View Contacts link on the Address Book (View Addresses) page or the Address Book - Customer's Primary Information page.	Review contacts that are associated with the customer.
Address Book: Customer's Primary Information	RX_ADR_CUST_DFLTS	Click the View Customer's Primary Information link on the Address Book (View Addresses) or Address Book (View Contacts) page.	Review default contacts and addresses that are used for specific purposes.
Address Book - Create New Address	RX_ADR_REP_ADDR	Click the Add New Address button on the Address Book - Contact Information page.	Add a new address for a contact.
Address Book - Create New Contact	RX_ADR_NEW_REP	Click the Add New Contact button on the Address Book (View Addresses) page or the Address Book (View Contacts) page.	Create new contacts or new addresses for the customer.
Address Book - Select Contact	RX_ADR_USE_CNTCT	• Click a Replace link on the Address Book - Customer's Primary Information page. • Click the Copy Existing Contact link on the Address Book - Create New Contact page.	Select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries.

Page Name	Object Name	Navigation	Usage
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	• Click a Replace link on the Address Book - Customer's Primary Information page. • Click the Copy Existing Address link on the Address Book - Create New Contact page.	Select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries.
Address Book - Contact Information	RX_ADR_REP_INFO	• Click the Edit link on the Address Book - Customer's Primary Information page. • Click the Edit link on the Address Book (View Contacts) page.	Edit an existing contact's information.
Address Book - Create New Address	RX_ADR_CUST_ADDR, RX_ADR_NEW_ADDR, RX_ADR_NEW_REP	• Click the Add New Address button on the Address Book (View Addresses) page. • Click the Add New Address link on the Address Book - new address - Select Address page.	Add a new address for a customer. You do not need to associate the address with a specific contact.
Address Book - Update Address	RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR	• Click the Edit link on the Address Book - Customer's Primary Information page. • Click the Edit link on the Address Book (View Addresses) page. • Click the Edit link on the Address Book - Contact Information page for any contact who is associated with one or multiple addresses.	Modify existing addresses.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Address Book (View Addresses) page or on the Address Book (View Contacts) page.	Confirm that you want to delete an address or contact. A deleted address is removed from the contact's address book but remains in the system with an end date that is equal to the date on which it was deleted.

Reviewing Customer Addresses

Access the Address Book: View Addresses page.
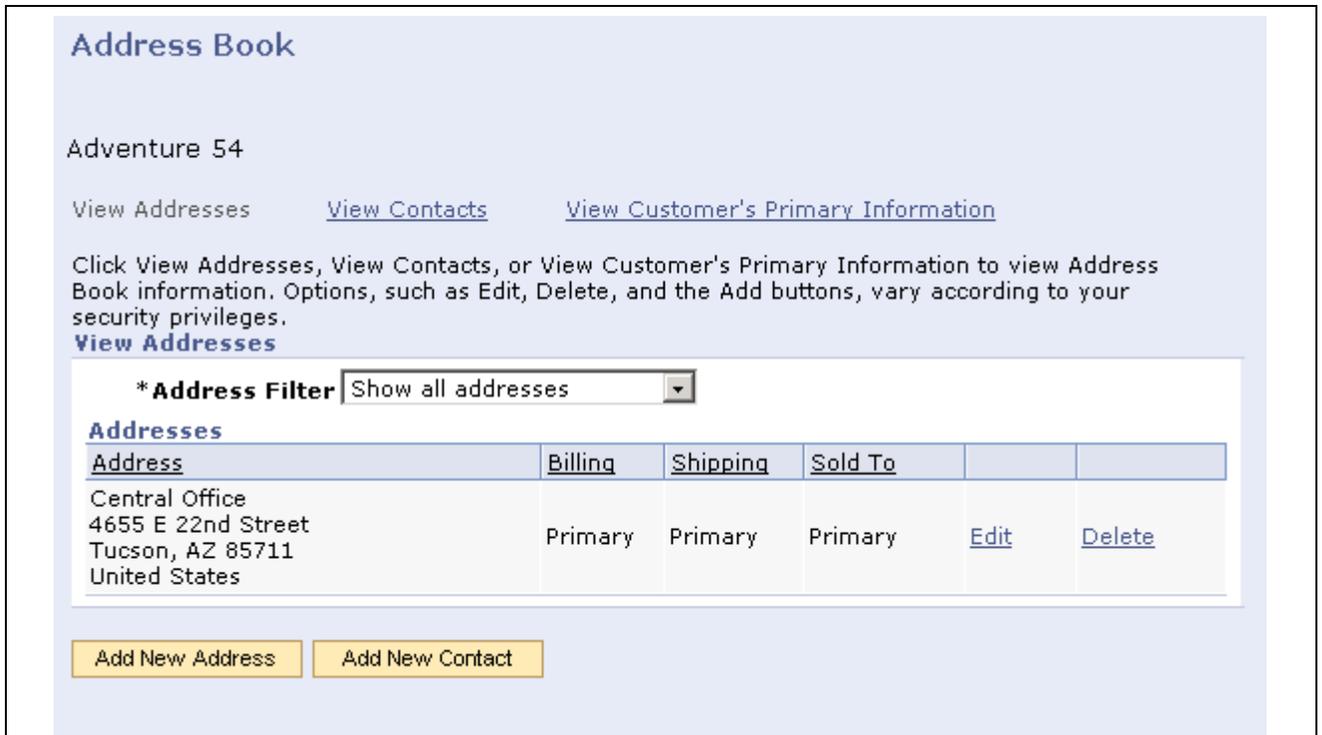
Address Book: View Addresses page

Addresses that are associated with the customer appear on this page. If the address is associated with a specific site, the site name appears as well.

Address Filter	Select *Show all addresses, Show billing addresses, Show install-to site addresses, Show shipping addresses,* or *Show sold-to addresses.*
Billing, Shipping, and **Sold To**	*Primary* appears in the appropriate column for the primary billing, shipping, and sold-to addresses. *Yes* appears in the appropriate column for additional addresses. To change a company's primary addresses, access the Address Book - Customer's Primary Information page.

Deleting Addresses

When you click the Delete link for an address, the Delete Confirmation page appears.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Reviewing Customer Contacts

Access the Address Book: View Contacts page.

Address Book - View Contacts page

Contacts who are associated with the customer appear on this page.

Billing, Shipping, and **Sold To**	*Primary* appears in the appropriate column for the primary billing, shipping, and sold-to contacts. *Yes* appears in the appropriate column for additional contacts. To change a customer's primary contacts, access the Address Book - Customer's Primary Information page.

Reviewing Customer Primary Information

Access the Address Book: Customer's Primary Information page.

Address Book: Customer's Primary Information page

The customer's overall primary contact and address and primary billing, shipping, and sold-to contacts and addresses appear on this page. You can modify the contacts and addresses or select a new primary contact and address.

Creating Contact Addresses

Access the Address Book: Create New Address page.

Address Book: Create New Address page

This page is similar to the Create New Address page

Enter the new address information. If the address is a billing, shipping, or sold-to address, select the appropriate address role check box.

Note. The Address Roles appear only for users who are contacts of companies, not for end consumers.

Creating Customer Contacts

Access the Address Book: Create New Address page.

This page is similar in use to page that is used to create new contact addresses, except that it contains additional lines for you to enter contact information.

Contact Information

If the new contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Address Book: Create New Address - Contact Information page

Selecting Existing Contacts

Access the Address Book: Select Contact page.

Address Book: Select Contact page

Selecting Existing Addresses

Access the Address Book - Select Address page.

Address Book - Select Address page

Maintaining Name, Role Information, and Relationship Address for Customer Contacts

Access the Address Book - Contact Information page.

Address Book - Contact Information page

If the contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Click Edit or Delete to maintain the address for the contact-to-customer relationship. Click the Add New Address button to enter a new address for this relationship.

Updating Customer or Contact Addresses

Access the Address Book - Update Address page.

Address Book - Update Address page

This page is almost identical to the Address Book - Create New Address page. Unless you are a contact of a customer, the *Address Roles* are not visible.

Maintaining Consumer Contact and Address Information

This section lists the pages that consumers use to maintain their contact and address information.

Pages Used to Maintain Consumer Contact and Address Information

Page Name	Object Name	Navigation	Usage
Change Profile Info	RX_NAME_SIGNIN	Manage Profile, Change Profile Info	Review and edit name, password, and privacy preferences.
Manage Profile - Default Addresses	RX_PROFILE_DFLTS	Manage Profile, Default Addresses	View and initiate update of the consumer's default contact information, shipping address, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Change the consumer's address, phone number, and email address information.
Address Book - Customer's Primary Information	RX_ADR_CUST_DFLTS	Click the Change Default Shipping or Change Default Billing button on the Profile - Default Addresses page.	Review the consumer's primary address, primary billing address, and primary shipping address.
Address Book - Select Address	RX_ADR_SEL_CUST_DF	Click a Replace link on the Address Book - Customer's Primary Information page.	Select a new address of any of the address roles that appear on the Address Book - Customer's Primary Information page.
Address Book - Create New Address, Address Book - Update Address	RX_ADR_CUST_ADDR	• Click the Edit link or the Add New Address button on the Profile - Contact Information page. • Click the Edit link on the Profile - Customer's Primary Information page.	Create or update addresses.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Profile - Contact Information page.	Delete selected address.

Maintaining Consumer Address Books

This section lists the pages that consumers use to maintain their address books.

> **Note.** These pages are similar in appearance and usage to the pages that contacts use to maintain their address books. Differences in usage are explained below

Pages Used to Maintain Consumer Addresses Books

Page Name	Object Name	Navigation	Usage
Address Book	RX_ADR_CONSUMER	Click the Address Book link on the Profile page.	Review addresses that are associated with the consumer.
Address Book - Update Address	RX_ADR_CUST_ADDR	Click the Edit link on the Address Book page.	Modify addresses in the address book.
Address Book - Create New Address	RX_ADR_NEW_REP	Click the Add New Address button on the Address Book page.	Create addresses in the address book for the consumer.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	• Click the Replace link on the Address Book - Customer's Primary Information page. • Click the Copy Existing Address link on the Address Book - Create New Address page.	Select addresses to copy into new address book entries.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Address Book page.	Confirm that you want to delete the address, and select whether to delete it for all users or the current user.

Viewing Consumer Addresses

Access the Address Book page.

If the address is associated with a contact, the contact's name appears in the name columns. If the address is associated only with a consumer, the consumer's name appears in the name columns.

Deleting Consumer Addresses

Access the Address Book - Delete Confirmation page.

When you delete a consumer address that is not associated with a contact, the system displays only the Yes - Delete and No - Do Not Delete buttons on this page.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Viewing Internal Contacts

This section discusses how to view internal contacts.

Page Used to View Internal Contacts

Page Name	Object Name	Navigation	Usage
Contact Directory	WC_CONTACT_DIR	Customer Care, Internal Contacts, Contact Directory	View the names and contact information of people in an organization who are available for customers to contact for assistance.

Sending Contact Us Messages

This section discusses how to send Contact Us messages.

Page Used to Send Contact Us Messages

Page Name	Object Name	Navigation	Usage
Contact Us	WC_CONTACT_US	Contact Us, Contact Us	Self-service users can send messages to your organization.

Sending Contact Us Messages

Access the Contact Us page.

Contact Us page

Each subject-topic combination is associated with a workflow action that you specify. The workflow action sends a notification that alerts the recipient to the newly submitted message.

If you use the 360-Degree View feature, the system creates an interaction when the user sends the message. In this situation, the notification normally includes a link to the new interaction.

If the user requests a confirmation email, the system sends a message based on the Contact Confirmation email template. You cannot choose a different template for the confirmation email. You can, however, modify the text of the template.

Live Chat with Agent

Expand this page region and click the Get Auto-answer button to initiate a two way chat session with a support agent.

See Also

Chapter 20, "Setting Up Customer Self-Service," page 299

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

PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook, "Working with PeopleSoft CRM Self-Service Pagelets"

Registering Products

This section discusses how to:

• Register products.

• Enter product registration information.

Pages Used to Register Products

Page Name	Object Name	Navigation	Usage
Product Registration	RF_PROD_REG_SRCH	Product Registration, Product Registration	Register new or existing products.
Product Registration - Product Registration Details	RF_PROD_REG_DET	Click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page.	Enter product registration information.

See Also

Chapter 20, "Setting Up Customer Self-Service," Setting Up Product Registration, page 306

Registering Products

Access the Product Registration page.

Product Registration page

The Product Catalog group box lists the catalogs that you can use for product registration. Depending on how a catalog is set up, you can view a simple list of products, a list of product categories, or both. Regardless of whether you need to browse through different levels to find a product, click a product link to access the Product Registration - Product Registration Details page and submit the product registration.

Note. In addition to registering products in PeopleSoft CRM self-service, users can also contact CSRs, who can register products for customers through the 360-Degree View.

See Also

Entering Product Registration Information

Access the Product Registration Details page.

Product Registration Details page

The Registration group box displays the name of the product that you selected from the catalog, as well as the installed product fields that you selected during setup to appear for product registration purposes.

Administrators can define the fields that appear on this page by using the Product Registration Setup page. Modify these fields for a specific product on the Installed Product page in the Product Definition component. Also, when defining these fields, you can specify whether a user can modify the field value on existing installed products.

In this example, self-service users can enter the serial ID, purchase date, site, location details, and comments for the registration. When the product registration is submitted successfully, the system displays a record of it with the date of registration in the Your Existing Product group box. The system updates the associated installed product with the information that the user entered during product registration. If it is a new product, the system creates an installed product with a status of *Installed*.

Submit   Click to submit and save the product registration. The system automatically populates the registered date with the current system date when you submit the registration.

Cancel and Return   Click to return to the Product Registration page.

PART 6

Contact Management

Chapter 22
Working with Contacts

Chapter 23
Working with Tasks

Chapter 24
Working with Call Reports

CHAPTER 22

Working with Contacts

This chapter provides an overview of contact management in PeopleSoft CRM and discusses how to:

• Manage contacts.

• Maintain contact groups.

Understanding Contact Management

Contact management enables salespeople (or relationship managers) to manage contacts, tasks, and calendars across all of their accounts by using an easy and intuitive user interface. Relationship managers can:

• Add system contacts to their list.

• Create and manage contact groups.

• Send an email message to selected contacts.

• Create tasks, schedules, and call reports for selected contacts.

This feature focuses on shared contacts. The contacts entered and viewed are enterprise contacts and do not include a user's personal contacts or contacts that are private in any manner. This means that all users can access the contacts and can add the same contacts to their list.

To add private data for a contact that is visible only to you, use the user-defined fields within the Person component.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Person Business Objects".

Contact management is widely used in industries that support business-to-business (B-to-B), high net worth business-to-consumer, and team selling environments, such as financial services and insurance.

Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees and what took place during the event.

Contact Management Toolbar

PeopleSoft CRM provides a toolbar that is on every Contact Management page. This toolbar enables you to transfer between Contact Management pages and perform commonly used actions for your contact list. You can also access accounts, tasks, and calendars by using the toolbar.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Managing Sales Leads and Opportunities"

Managing Contacts

This section discusses how to:

- Access contacts.
- Enter additional filtering criteria.
- Modify columns that appear on the contacts list.
- Personalize the search filter.
- Add existing contacts to the contacts list.
- Add contacts to the system.

Pages Used to Manage Contacts

Page Name	Object Name	Navigation	Usage
My Contacts	RD_CONTACTS	My Contacts	Access contacts to perform various actions for the contacts.
Send Notification	RD_EMAIL_CNTCT	Select *Email Contact(s)* in the Action field on the My Contacts page.	Send an email to one or more contacts.
My Contacts - Search Contacts	RD_IMPORT_CONTACTS	Click the Search Contacts button on the My Contacts toolbar.	Search for contacts that are already defined in the system and select one or more to add to the My Contacts list.
Remove Contacts	RD_REMOVE_CNTCT	Select one or more listed contacts. • Click the Remove Contacts button on the My Contacts toolbar. • Select Remove Contact(s) from the Action drop down list and click the Go button.	Remove one or more contacts from the My Contacts and all contact groups to which the contact belongs.
Person	RD_PRSN_PRIMARY	Click the Add Contact button on the My Contacts page.	Add a contact to the system.

Accessing Contacts

Access the My Contacts page.

My Contacts page

Use the letters that appear below the View Contacts field as an index to select the starting letter of the contact names to view. You can modify the way the index appears: for example, you might define the index letters as *A-C, D-F,* and so forth.

See Chapter 3, "Setting Up General Options," Defining Alpha Indexes, page 38.

View Contacts	Select a contact group to view.
Advanced Filter	Click this link to enter additional criteria by which you can filter the contact list.
Select	Select one or more contacts for which to perform a specified action.
Check All / Clear All	Select to select all listed contacts or to clear all selected contacts.
	Note. This option selects or clears only the contacts on the page that currently appears.
Action	Select the action to perform for the selected contacts.
	For example, if you select *Email Contact(s),* then the system displays an email page that is pre-addressed to all of the selected contacts.

Actions are:

- *Add Call Report for Contact(s)*
- *Add Contact(s) to Group*
- *Add Task for Contact(s)*
- *Email Contact(s)*
- *Remove Contact(s)*

Security Considerations

The system provides safeguards against users viewing contact information for which they are not authorized:

- For users that do not have access to all companies that are defined in the system, the company column is blank.
- For users that do not have access to worker information, the worker home phone and worker home address columns are blank, even if they are visible to other users.

Entering Additional Filtering Criteria

Access the Advanced Filter section of the page.

My Contacts: Search page - Advanced Filter section)

Enter one or more search criteria to filter the results by the criteria entered.

Note. Unless the signed-on user has access to all companies, they aren't able to search for a contact based on the company criteria.

Show in Results   Select one or more roles to display only contacts for which you have the
                                       selected role(s). For example, select *View as Account Owner* to show only the
                                       contacts for customers where you are the account owner.

Modifying Columns that Appear on the Contacts List

Access the Personalize Column and Sort Order page.

Personalize Column and Sort Order page

The columns that appear on the My Contacts list are shown in the Column Order list box. You can select a
column and rearrange its order, hide it, or use it as a sort column.

Some predefined columns (*Home Address, Address, State, Postal, Employer, Cell Phone,* and *Home Phone*)
are not included in the column order and sort order that appear on this page. To set up the contact list so that
you can view those columns, click the Personalize Filter link on the Advanced Filter page.

Personalizing the Search Filter

Access the Personalize Filter Settings page.

Personalize Filter Settings page (1 of 2)

Personalize Filter Settings page (2 of 2)

Adding Existing Contacts to the Contacts List

Access the My Contacts - Search Contacts page.

Search Contacts page

This page initially appears with only the search fields visible. The results of the search appear in the contacts list. You can select one or more contacts to add to the My Contacts list.

You can also add contacts to the contact list from the contact list from these components:

• 360 Degree View

• Person

• Company

• Site

To automatically insert contacts to the contact list, specify *Yes* in the Auto Insert to My Contacts field that is available on the Sales page of the User Preferences component.

If this flag is set to *Yes* for a user, a user can click the Add to My Contacts toolbar button on the Company, Site, Person, Lead, or Opportunity components to add contacts on that component to the user's My Contacts list.

Contacts of a customer (company or consumer) are added to the customer account owner's and team members' contact lists. Contacts of a company's child companies can be added to the account owner's contact list. Contacts of leads and opportunities can also be added to the contact lists for the lead or opportunity team members.

See Also

Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 81

Adding Contacts to the System

Access the Person page.

Person page

When you access the Person page from the contact management toolbar, any contact that you add to the system is automatically added to your contact list.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Person Business Objects"

Maintaining Contact Groups

This section discusses how to:

• Manage contact groups.

• Add or remove contacts of a contact group.

• Maintain groups and group membership.

Pages Used to Maintain Contact Groups

Page Name	Object Name	Navigation	Usage
Group Management	RD_GROUP_MGT	My Contacts Click the Group Management toolbar button.	Manage contact groups.
Group Selections	RD_CNTCT_GRP	My Contacts Select *Add Contacts to Group* in the Action field.	Add or remove contacts of a contact group.
Group Information	RD_GROUP_MGT	• Click the name of an existing group on the Group Management page. • Click the Add Group button on the Group Management page.	Maintain groups and group membership.

Managing Contact Groups

Access the Group Management page.
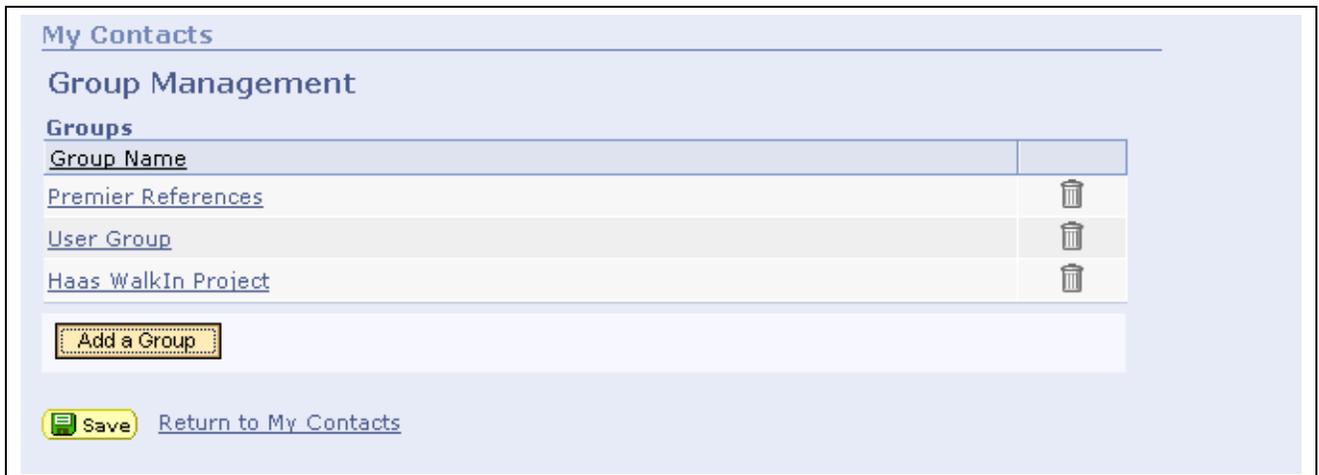
Group Management page

Group Name   Click a listed group to open the Group Information page for the group.

Add a Group   Click this button to access the My Contacts - Group Information page and add group details and members to the group.

Adding or Removing Contacts of a Contact Group

Access the Group Selections page.

Group Selections page

Select   Click this button to access the Group Information page where you can add
                                   or remove contacts of the group.

Maintaining Groups and Group Membership

Access the Group Information page.

Group Information page

Enter values in the First Name or Last Name fields and click Select. The system displays a page that lists all of
your contacts with names beginning with the characters you entered. Select one or more contacts and then
select an action to create a new contact. Click Save to add the selected contact to the contact group.

CHAPTER 23

Working with Tasks

This chapter provides an overview of task management in PeopleSoft CRM and discusses how to:

• Set up task management.

• Create tasks.

• Manage tasks.

• View calendars.

• Manage meetings.

See Also

Chapter 22, "Working with Contacts," page 339

Understanding Task Management

Task management enables users to plan and manage the day-to-day activities that are associated with managing sales, service, and support activities.

Tasks are associated with workflow items that are triggered by PeopleSoft CRM transactions, such as leads and opportunities. If a transaction triggers a workflow item that assigns a task to a user, than that task appears in the user's task list and the user's calendar. If the task is for a meeting, the task appears in the user's meeting list. You access task lists, calendars, and meeting lists using the My Tasks, My Calendar, and My Meetings pages.

Users can access their task list directly from the left-hand menu or by clicking a toolbar button that is available on the My Contacts, My Calendar, and My Meetings pages. Additionally, users can view tasks that are associated with a transaction or component.

You can create tasks from these components.

• Lead

• Opportunity

• Strategic account management

• Risk Component in Wealth Management

• Change Management

• Case

• Service Order

Details of a task that appear on the My Tasks, My Calendar, or My Meetings page are available by clicking the task name.

Task Types

PeopleSoft CRM provides these task types when the application is first installed:

• Appointment

• Meeting

• Phone call

• Reminder

• To-do

You can also set up additional task types.

See .

Task Management Process

A task owner creates a task and assigns it to one or more persons. A notification is then sent to each of the assignees that a task is assigned to them, and the task appears in the assignee's task list. The assignee can either accept or decline the task. The owner is notified when the assignee marks the task as completed.

The task owner can reassign a task for any of the assignees. An assignee can reassign a task that is assigned to them. When a task is reassigned, the system sends a notification to the new assignee that the task is assigned to them. When the new assignee accepts or declines the task, the system notifies the owner.

This diagram shows the task management process:
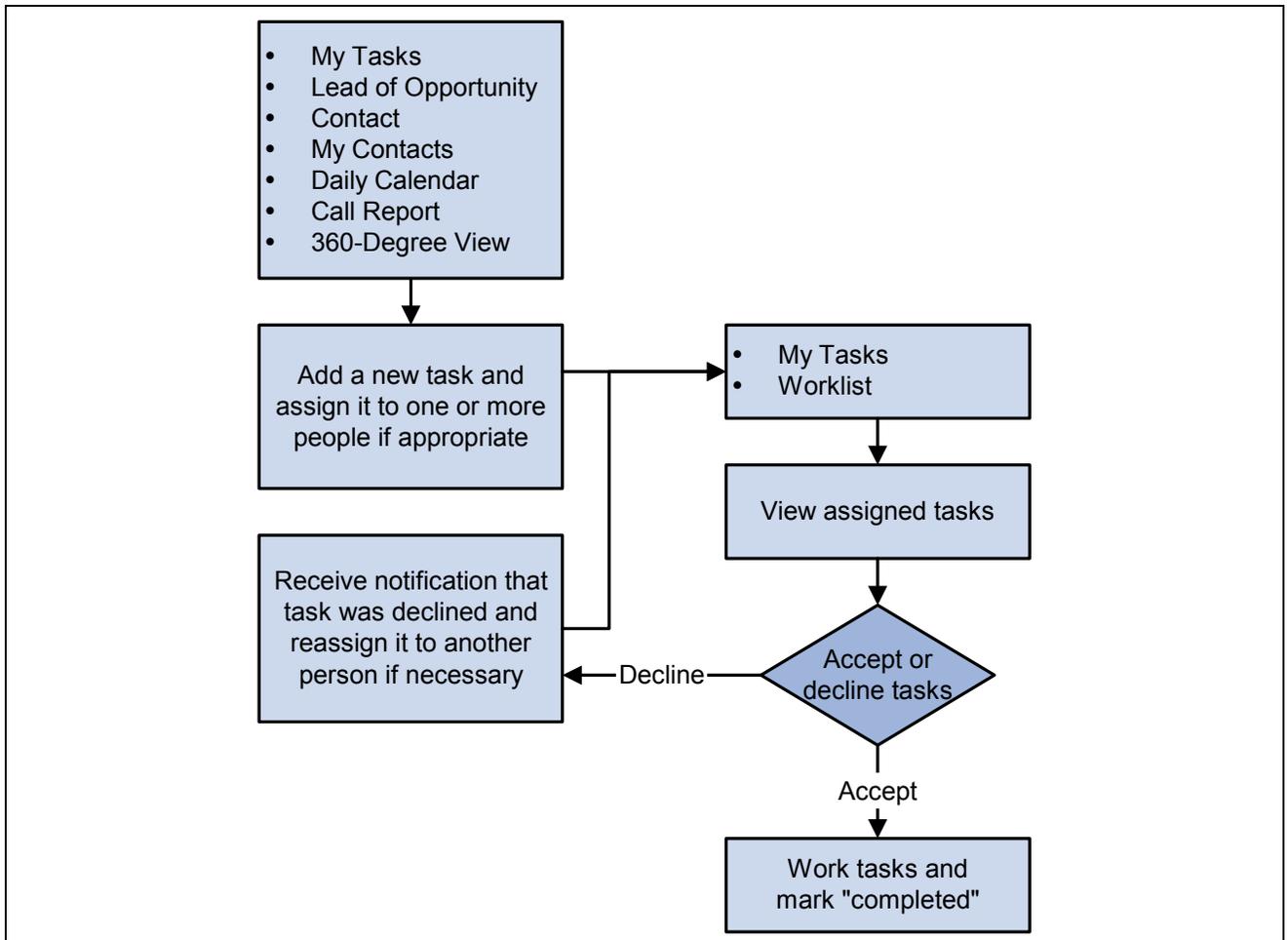
Task Management Process Flow

You can also call the Task web service to perform many task management inquiries and notifications.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services".

Personal Information Managers

You can synchronize tasks between the PeopleSoft CRM database and personal information management (PIM) systems such as Microsoft Outlook and Lotus Notes.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Managing Sales Leads and Opportunities"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Person Business Objects"

Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 60

Chapter 19, "Using the 360-Degree View," page 287

Setting Up Task Management

To set up task management, use the Task Priority (RB_TSK_PRIORITY) and Task Type (RB_TSK_TYPE) components.

This section lists the pages used to set up task management and discusses how to:

• Define task types.

• Define task priorities.

• Define task group templates.

• Define task durations.

Note. Your PeopleSoft Application Administrators can control and modify access to all PeopleSoft CRM pages, including those that are used for Task Management, through the standard PeopleTools security using roles, permission lists, and user IDs. Documentation for this security administration is provided in *Enterprise PeopleTools PeopleBook: Security Administration*.

Pages Used to Set Up Task Management

Page Name	Object Name	Navigation	Usage
Task Type	RB_TSK_TYPE	Set Up CRM, Common Definitions, Task Management, Task Type, Task Type	Define task type codes that enable the user to categorize tasks.
Task Priority	RB_TSK_PRIORITY	Set Up CRM, Common Definitions, Task Management, Task Priority, Task Priority	Define task priority codes that enable the user to designate a priority for tasks.
Task Group Template	RB_TSK_GRP_TPL	Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template	Define task group templates and task durations.
Clone Template	RB_CLONE_TXN_SEC	Click the Clone button on the Task Group Template page.	Specify a new template name to be created from the current template.

Defining Task Types

Access the Task Type page.

Task Type page

Task Type

The options you select on this page control the options that are available on the Task Detail page.

Task Type	Enter the type of the task.
Application Usage	Select the application where the task type is used. A value of *All Applications* indicates a universal type that is available to all applications.
Active	Select to make the task type active. Users can only create tasks for active task types.
To Accept Task	Select to indicate whether all of the assignees need to work on the task or only one assignee needs to work on the task when the task is assigned to multiple people.
Pencil In (Mark as free Time)	Select to indicate that the task duration is not treated as busy time by the Assignment Engine.
Record Attendance	Select to enable recording of attendance.
	If this is selected, the Task Details page shows a column of check boxes in the Invitee/Assignee grid for users to indicate whether the Invitee/Assignee attended the meeting. This check box is usually selected for meeting task types.

Show Repeating Options	Select to enable the user to select the frequency and time period in which this task repeats.
Do not show in Calendar	Select to suppress the task from the user's calendar. This option is cleared by default. **Note.** The task appears in the user's calendar only if this option is cleared *and* the user enters a start and end date and time for the task.
Show Assigned to Grid and **Label for Assigned to Grid**	Select to have the assigned to grid appear on the Task Detail page. If you select Show Assigned to Grid, then the Label for Assigned to Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Assigned To.* This value comes from the message catalog.
Show Invitation Type	Select to have the Invitation Type column appear in the Invitees grid on the Task Detail page.
Show Contacts Grid and **Label for Contacts Grid**	Select to have the contacts grid appear on the Task Detail page. If you select Show Contacts Grid, then the Label for Contacts Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Contacts.* This value comes from the message catalog.
Label for Assign Button	Select a value to change the label for the Assign Button that appears on the Task Details page. By default, the system displays *Assign.* This value comes from the message catalog.
Show Task in Task List	Select to have the task appear in the task list for the task owner and all assigned users.
View or Link Transactions	Select to have the View or Link Transactions link appear on the Task Detail page when the user adds a task of this type.
Calendar Image	Enter the name of the image that identifies the task type in the task list and calendar.

See *Enterprise PeopleTools PeopleBook: System and Server Administration, "Using PeopleTools Utilities"*

Field Display Options

Start Date Required, End Date Required, Start Time Required, End Time Required, and **Location Required**	Select the fields that are required for this task type.
Start Date Visible, End Date Visible, Start Time Visible, End Time Visible, and **Location Visible**	Select the fields that are visible for this task type. If you indicate that a field is required, you must also indicate that it is visible. However, a field can be visible but not required.

PIM Integration Options

Select the task type that displays on a PIM (personal information managers) for this task type. You can specify task types for integration with Outlook and with Lotus Notes.

See *PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook,* "Setting Up PeopleSoft Enterprise CRM Infosync Applications".

Defining Task Priorities

Access the Task Priority page.

Task Priority page

Code	Enter a code to identify the task priority.
Default	Select one priority as the default for all tasks.
Active	Select to indicate that this task priority is active. Only active priorities are available to assign to tasks.
Image Name	Select the image that represents the priority visually. If defined for a task priority, the image appears on the My Tasks list for each task that has that priority.

See Also

Defining Task Group Templates

Access the Task Group Template - Type page.

Task Group Template - Type page

Task group templates ensure that all tasks that must be completed to accomplish the goal that is assigned. For example, the task group Install Hardware might consist of three tasks: Installation, Test Install, and Installation Acceptance. This is particularly useful when the tasks are performed by different people with different reporting relationships.

When a user schedules a task group, the task group template creates and assigns each task within the group.

Application Usage   Select from *All Applications, Change Management, Field Service, HelpDesk, Personal Information Mgmt, Sales, Strategic Planning* or *Support.*

                               Note. If you select *Change Management, HelpDesk, Strategic Planning* or *Support* the system displays the Duration tab. You can use this page to enter offset days, duration days, and start and end times. For *Change Management,* you enter only days, hours and start use codes.

Task Type, Priority, Task   Specify the default task type, priority, assignee, and location of each tasks that
Owner, Assigned To, and   is part of the task group. You can modify these default values at runtime.
Location

Defining Task Durations

Access the Task Group Template - Duration page.

Task Group Template - Duration page

Use this page to specify a duration for each task. If the task type requires a start or end time (for example, meetings), you must enter these fields. The specific fields that appear on this page are dependent on the task type. This tab appears only when you select *Change Management, HelpDesk, Strategic Planning* or *Support* from the Application Usage field.

Note. For Strategic Planning, the system validates the required fields. For example, Start Time and End Time are required for meetings. The system, however, doesn't validate fields for other application usages.

Offset Days	This field appears only if you selected *HelpDesk, Strategic Planning* or *Support* in the Application Usage field.
	Enter the number of days that are added to the plan start date to derive the task start date. The task end date is derived from adding the Duration Days to the task start date.
Duration Days, Start Time and **End Time**	Enter the number of days a task should take as well as the start and end times for each task.
Start Use Code	This field appears only if you selected *Change Management* in the Application Usage field.
	Select one of these values to indicate when a task should start:
	• *Current Phase Start*
	• *Next in Sequence*
	• *Prior Phase Start*
	• *Prior Task Start*

Managing Tasks

This section lists common elements and discusses how to:

• Set task defaults.

• Enter additional filtering criteria.

- View task lists.
- Create tasks or update task details.
- Add persons.
- View or update task notes.
- Link transactions to a task.

Common Elements Used in this Section

History   The History drop-down list box displays a list of the task management pages that you accessed during the current session. Select a listed page to transfer to that page.

Pages Used to Manage Tasks

Page Name	Object Name	Navigation	Usage
My Tasks	RB_TSK_MY_TASKS	My Tasks, My Tasks	View the list of tasks that are assigned to you. You can select a task and view its details or add a task.
My Tasks - User Preferences	RB_TSK_PREF_SEC	My Tasks Click the Preferences toolbar button in the My Tasks component.	Set defaults for tasks that you create and for how the My Tasks list appears.
Task Details	RB_TSK	• Click a listed task on the My Tasks page. • Click the Add Task toolbar button on the My Task page. • Select a task type and click the Add Task button on the My Tasks page.	Create a task or update task details.
Task Repeating Options	RB_TSK_REPEAT_SEC	Click the Options button next to the Repeats field on the Task Details page.	Specify the frequency with which a task repeats. This page is accessible only if you select the Show Repeating Options check box for the task type on the Task Type page.
My Tasks - Notes	RB_TSK_NOTE	Select the Notes tab on the Task Details page.	View or add notes to a task.
Related Objects for the Task	RB_TSK_TXNS	Click the View or Link Related Objects link on the Task Details page.	Link related transactions to a task.

Viewing Task Lists

Access the My Tasks page.

My Tasks page

The task priority indicator appears in the left most column on this page, if the default priority is not assigned to the task. The task type icon appears in the column immediately to the left of the subject column.

See Chapter 23, "Working with Tasks," Defining Task Priorities, page 355 and Chapter 23, "Working with Tasks," Defining Task Types, page 352.

Tasks	Select a filter to view only tasks that meet the filter criteria. The available filters are:
	• *All Open Tasks*
	• *Meetings This Week*
	• *Meetings Today*
	• *Overdue Tasks*
	• *Tasks This Month*
	• *Tasks This Week*
	• *Tasks Today*
	• *Tasks Tomorrow*
	By default, all open tasks, appointments, and meetings appear in the task list. You can click the Preferences button to select a different default filter.
My Status	Indicates whether the task is assigned to you and whether you accepted or rejected the task.
Task Status	Indicates the task status.
Contact	Displays the primary contact for the task or meeting.
Task Type	Select a task type to add.
Add Task	Click to add a task of the selected type.

Entering Additional Filtering Criteria

Click the Advanced Filter link.

My Tasks: Search page

Enter one or more search criteria to filter the results by the criteria entered. To modify the columns that appear in the My Tasks grid, click the Personalize Filter link. On the Personalize Search Settings page, select or clear the check box for the appropriate column.

Task Status prompt	Click to display a list of task statuses. Choose one or more statuses to filter the task list by those statuses.
Show in Results	Select one or more roles to display only tasks for which you have the selected roles.
Personalize Filter	Click to access the Personalize Search Settings page, where you can modify the columns that appear on the My Tasks grid.

Setting Task Defaults

Access the My Tasks - User Preferences page.

My Tasks - User Preferences page

Use this page to personalize how tasks and calendar items appear in the My Tasks component and to set defaults for tasks that you create. The Default Filter option controls which tasks appear in the task list when you first access the component.

Note. You can also set these defaults under My Personalizations, General Options.

Creating Tasks or Updating Task Details

Access the Task Details page.

Task Details page (1 of 2)

Task Details page (2 of 2)

Task Details

Subject	Enter the meeting subject that appears on the My Tasks list.
Task Type	Select a task type if you access this page from the toolbar. If you access this page from the My Tasks page, the system displays the task type you select on the My Tasks page.
Status	Select the status of the task from the statuses that appear in the drop down list: *Cancelled, Completed, In Progress,* and *Open.*
Private	Select to permit only the task owner to access task details.
Start Date, Start Time, End Date, and **End Time**	Enter the starting and ending dates and times of the meeting.

Owner Name	Enter the name of the task owner. The owner might not actually perform the task, but is responsible for task completion.
Repeats	Select the reoccurrence frequency for the task.
Options	Click to access the Task Repeating Options page (RB_TSK_REPEAT_SEC) configure the settings for the repeating task.
View or Link Related Objects	Click to link a company, lead, opportunity, or partner to the task. This link appears only if View or Link Transactions was selected on the Task Type page. Clicking this link accesses the Related Objects for the Task page (RB_TSK_TXNS) where you can search for and select objects to link to the task.

> **Note.** If you select a company, lead, opportunity, or partner on the Related Objects for the Task page, the name appears as a link above the View or Link Related Objects link. If you click the name of the company, lead, opportunity, or partner, the system takes you to the page where the object was originally established. If a company has one or multiple contacts, the system still takes you to the Company page.

<Invitees / Assignees>

The label of this grid changes depending on the task type. As delivered, the label is Invitees for the *Meeting* task type and Assigned To for task types *Activity, Approval,* and *Mtg.*

The systems displays different information in this section based on how you configured the Task Type page. You can add this grid to add task types or modify the labels using the Task Type page.

Display Name	Enter the name of the person to whom the task is assigned or who is invited to the meeting.
Reassign	Click to replace the meeting invitee with another contact. The system sends the new invitee an email. The system removes the task from the original invitee's task list.
Create	Click to create the meeting invitee as a contact in the case where a meeting invitee was added in a personal information manager (PIM) such as Lotus Notes or Outlook and does not exist in the CRM database.
Role	Select the person's role. The company name that the person represents appear in the list, as well as other roles the person has, such as *Individual Consumer.*
Status	Indicates the status of the task assignee: *Assigned, Accepted,* or *Declined.*
Attendance	Select *Absent* or *Attended.* This field is available only if you select Record Attendance on the Task Type page.
Invitation Type	Select whether the invitation is *Mandatory, FYI,* or *Optional* for the invitee. This column appears only if the Show Invitation Type field is selected for this task type on the Task Type page.

Contacts

Primary	Select to indicate that the contact who is listed in the row is the primary contact for this task. There is only one primary contact for a task, and the primary contact name appears for the task when it is listed on the My Tasks page.

Adding Persons

Access the Task - Search Contacts page.

Search Contacts page

To add a person to either the Invitees grid or the Contacts grid, enter a first and last name below the grid and click the Add button.

If the first and last name do not uniquely identify a person, the Search Contacts page appears. Select one or more listed persons and click Add Persons to Task.

The selected persons are added to the task and you are transferred back to the Task Details page. You can also enter new search criteria or return to the Task Details page without making any selections.

The task owner and assignee can reassign the task by changing the person name in the assignee box.

See Also

Chapter 23, "Working with Tasks," Setting Up Task Management, page 352

Viewing or Updating Task Notes

Access the My Tasks - Notes page.

See Chapter 5, "Working with Notes and Attachments," page 115.

Linking Transactions to a Task

Access the Related Objects for the Task page.

Transactions for the Task page

When you select a transaction type, the text that appears next to the Add Transaction button changes to reflect the transaction type.

Primary   Select to designate that this is the primary transaction that is associated with the task. The system displays this task on the Task Details page in the field above the View or Link Related Objects link.

Transaction   Select a transaction type.

Add Transaction   Select to choose a transaction from a list of transactions for the selected transaction type.

Viewing Calendars

This section discusses how to view calendars.

Pages Used to View Calendars

Page Name	Object Name	Navigation	Usage
Daily Calendar of <name>, Weekly Calendar of <name>, Monthly Calendar of <name>	RB_TSK_CALENDAR	• My Calendars Click the Daily, Weekly, or Monthly link. • My Tasks Click the My Calendar toolbar button. Click the Daily, Weekly, or Monthly link.	View or update a calendar.
Daily Team Calendar of <name>, Weekly Team Calendar of <name>, Monthly Team Calendar of <name>	RB_TSK_GRPCALENDAR	On the daily, weekly, or monthly calendar, click the View My Team Calendar link.	View calendar entries for all direct reports.
Other Calendars for <name>	RB_TSK_CAL_SRCH	On the daily, weekly, or monthly calendar, click the View Other Calendars link.	View another person's calendar.
My Tasks - User Preferences	RB_TSK_PREF_SEC	My Tasks Click the Preferences on the toolbar in the My Tasks component.	Set the default calendar view (daily, weekly, or monthly).

Viewing or Updating Calendars

Access the My Calendars page.

See Chapter 16, "Using Calendars," page 219.

Viewing Another Person's Calendars

Access the Other Calendars for <name> page.

Other Calendars for Burt Lee page

Select the Person's Calendar to View

The names of all people who report to you appear in this list. You can click a person's name to view their calendar or refine the search criteria and search again.

Show in Results

Select one or more listed relationships. Only those persons who meet the search criteria and have the selected relationships to you appear in the search results.

Managing Meetings

This section lists the page that you use to manage meetings.

Page Used to Manage Meetings

Page Name	Object Name	Navigation	Usage
My Meetings	RB_TSK_MY_TASKS	My Meetings, My Meetings	View meetings in which you are a participant.

Viewing Meetings

Access the My Meetings page.

My Meetings page

This page lists all tasks of type *Meeting* that are assigned to you. Click a listed subject to view meeting details.

Meetings	Select one of these values: *All Meetings, Meetings this Month, Meetings this Week,* and *Meetings Today* to filter the list.

CHAPTER 24

Working with Call Reports

This chapter provides an overview of call reports in PeopleSoft CRM and discusses how to:

• Add call reports.

• Add related objects to the call report.

Understanding Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees, what took place during the event, and any follow-up tasks.

You can view or add call reports directly to a company, consumer, contact, lead, opportunity, or task from the Call Reports tab on these components. When you add a call report to a lead, opportunity, or task, the call report is linked to the customer for the lead, opportunity, or task.

You can view call reports for a customer or contact from the Call Reports tab on the Customer 360-Degree View page or access call reports directly from the left hand navigation. If you have licensed PeopleSoft CRM Portal Pack, you can view your own call reports in the My Call Reports pagelet that you can add to your home page by using the Personalize link.

See Also

PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook, "PeopleSoft Enterprise CRM Portal Pack Preface"

Working with Call Reports

This section lists the pages used to access call reports and discusses how to add call reports.

Pages Used to Work with Call Reports

Page Name	Object Name	Navigation	Usage
Call Report Details	RD_CALL_REPORT	• Click My Contacts. Select a contact. Then select *Add Call Report for Contact(s)* in the Action field and click Go. • Sales, Add Call Report • Sales, Search Call Reports	Add, search, or update a call report. **Note.** You can also navigate to the Call Report Details page from the Call Reports page in the Company, Person, Partner Company, Lead, or Opportunity components.
Company - Call Reports, Partner Company - Call Reports	RD_CALLRPT_LST_TXN	• Customers CRM, Search Company, Company Select the Call Reports tab. • Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab.	View a list of call reports for a company or partner company.
Person - Call Reports	RD_PRSN_CALL_RPTS	Customers CRM, Search Person, Person, Call Reports	View a list of call reports for a consumer or contact.
Lead - Call Reports, Opportunity - Call Reports	RSF_CALL_RPTS	• Sales, Search Leads, Leads Select the Call Reports tab. • Sales, Search Opportunity, Opportunity Select the Call Reports tab. • Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab.	View or add call reports on a lead or opportunity.
Related Objects for the Call Report	RD_CALLRPT_TXNS	Click the View or Link Related Objects link in the General Information section on the Call Report page or on the Call Report Details page.	View a list of related objects (companies, leads, opportunities, and partner companies) for the call report or add a related object to the call report.

Adding Call Reports

Access the Call Report page.

Call Report Details

Save | Add New Call Report | My Accounts | My Contacts | My Tasks | My Calendar | » | Personalize

General Information

*Subject [Sales Meeting]   Date [05/03/2006]
*Event Type [Face to Face Meeting ▼]   Location [Building 3, 12th Floor]

View or Link Related Objects

▽ **Notes Summary**   Customize | Find | View All | First ◁ 1 of 1 ▷ Last

Select	Subject and Details	Attachment(s)	Added By	Date Added	
☐	Close contract for software services Make sure all managers sign agreement		Stu Marx	05/03/2006 5:20PM	🗑

☐ Check All / Clear All
⌐ [Email Note] | [Add Note]

Call Report Details page (1 of 2)

Contacts   Customize | Find | First ◁ 1-2 of 2 ▷ Last

Select	Primary	Name	Phone	Company	Email Address	
☐	☐	Stu Marx	555 5551260	[▼]	smarx@peoplebank_psft.com	🗑
☐	☑	David Perry	001-57902345	[▼]	dperry@abcenterprises.com	🗑

☐ Check All / Clear All
⌐ [Email Call Report]

Add Contact

First Name [_____]   **Last Name** [_____]   [Select]

Follow-up Tasks   Customize | Find | First ◁ 1 of 1 ▷ Last

Select	Description	Location	Status	Start Date	End Date	Owner Name	
☐	Follow Up Call		Open	05/08/2006	05/08/2006	Stu Marx	🗑

☐ Check All / Clear All
[Add Follow-up Task]   [Email Selected Tasks]

Audit History

Created 05/03/2006 5:23PM PDT   **By** INF_DEV   Stu Marx
Modified 05/03/2006 5:24PM PDT **By** INF_DEV   Stu Marx

Call Report Details page (2 of 2)

General Information

Enter information that describes the event.

Event Type	Select one of these values: *Face to Face Meeting, Telephone,* or *Other.*
View or Link Related Objects	Click to access the Related Objects for the Call Report page where you can view or add related companies, leads, opportunities, and partner companies.

Add a Note and Notes Summary

Enter notes and attachments that relate to the event.

See Chapter 5, "Working with Notes and Attachments," page 115.

Contacts

View the list of contacts that attended the event and designate the primary contact.

Email Call Report	Select one or more contacts and then click this button to email the call report to the selected contacts.
	Note. You must save a call report before you can email it.

Follow Up Tasks

View the list of tasks associated with the event. When you create a follow up task for a call report, its contacts are assigned as the contacts for the task by default.

Add Follow-Up Task	Click to access the Task Details page.

See Chapter 23, "Working with Tasks," page 349.

Adding Related Objects to the Call Report

Access the Call Report Details - Related Objects for the Call Report page.

Call Report Details - Related Objects for the Call Report page

Select a related object; either *Company, Lead, Opportunity,* or *Partner.* The field to the right changes based on your selection. Select the related object. Click the Add Related Object button.

Click the Return to Call Report Details link to go back to the Call Report Details page.

PART 7

Entitlement Management

Chapter 25
Setting Up and Managing Agreements and Warranties

Chapter 26
Defining Pricing Information for Services and Support Offerings

Chapter 27
Performing Entitlement Searches for Cases and Service Orders

Setting Up and Managing Agreements and Warranties

This chapter lists common elements, provides overviews of agreements and warranties, agreement pricing, how agreements and entitlements are used in PeopleSoft Order Capture, and discusses how to:

• Define service levels.

• Define entitlements.

• Define entitlement plans.

• Define agreement templates.

• Define agreements.

• Define warranties.

• Generate sales leads for agreement renewal.

Understanding Agreements and Warranties

This section lists common elements and discusses:

• Agreements and warranties.

• Default agreements.

Common Elements Used in This Chapter

Scope   Select the scope of the agreement. Values are:

Site: Indicates that the agreement applies to sites that are specified on the Scope Details page.

Note. For PeopleSoft Order Capture the system only allows *Site* as the scope for agreement templates when Available for Ordering is selected as an option.

Contact: Indicates that the agreement applies to named callers that are specified on the Scope Details page.

> **Note.** Although agreements with a scope of *Contact* are not available for selection on service orders, you can select agreements of either *Site* or *Contact* as scope for cases.
>
> If you create a case and associate it to an agreement (regardless of the scope) and then create a service order from that case, you must first select an agreement for the new service order; so the agreement from the case is not defaulted to the service order.

Max. Contacts (maximum contacts) or **Maximum Number of Contacts**
:   Enter the maximum number of named callers one can specify on the Scope Details page. This value is applicable to agreements with a scope of *Contact*.

Provider Group and **Group Member**
:   Select the default provider group and group member to perform the service request that is covered by this agreement. You can change these values on the service order.

Renew Agreement
:   Click to create a copy of the agreement that is about to expire. The CRM system sets the start date of the new agreement to the day after the end date of the old agreement and the new end date equal to the new start date plus the same number of days as the original agreement. You can establish new start and end dates for the renewed agreement and modify the information as necessary.

Payment Terms
:   Select when payment is due. Payment terms in PeopleSoft CRM are synchronized with the payment terms from PeopleSoft Financials.

Purchase Option
:   Select the method of purchasing the service or support offering for an agreement transaction. The prompt displays the purchase options (for agreement transactions) that are defined for the selected service, product or service-product combination in its pricing record on the Pricing Information page. The options for an agreement pricing record are:

    Flat: Indicates that the service or support offering is purchased for a flat fee.

    Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance.

    > **Note.** The *T&M* (time and material) purchase option only applies to agreement service or agreement case transactions, and on demand service or on demand case transactions; it is not applicable to agreement transactions.

Agreements and Warranties

In PeopleSoft CRM, *agreements* reflect service or support contracts. *Warranties* define the coverage that is offered for a particular item that is installed at a customer's site. Both warranties and agreements define the services or support that the customer is entitled to and the duration of the contract.

• Agreements:

  Agreements also define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself.

You may associate an agreement or agreement template with multiple products; however, if you have an integration to PeopleSoft Contracts that you activated on the Installation Options – Billing and Pricing Options page, you can only have one product per agreement or agreement template line. If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid of the agreement line.

You can define three types of agreements:

- PeopleSoft Field Service

  In a field service agreement, you specify what products in which customer sites are entitled to the service that is selected in each agreement line. An agreement can have one or multiple agreement lines, each of which also contains pricing and entitlement information. Each site on an agreement is assigned a site identification number (SIN) to identify whether a service can be performed at a particular location.

- PeopleSoft Support

  Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings. Support agreements can also define which people can contact your call center agents for support. Each named caller that is listed on an agreement is assigned a personal identification number (PIN) to identify the person as a valid caller when that person calls for support. You can define a support agreement for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

- PeopleSoft HelpDesk

  Help desk agreements represent an agreed upon level of service that an organization provides to its employees. Service level agreements define the response and restore times that the help desk will try to meet while responding to requests for service from employees. In addition to response and restore times, help desk agreements can define employees, products, installed products, priorities, sources of contact (phone, email, fax, and so on), departments, locations, and roles. Help desk agreements give agents the ability to associate an agreement line to a help desk case. Help desk agreements search against employee, products, installed products, plus other criteria such as case priority. An agreement can have one or multiple agreement lines, each of which also contains products, entitlements, and the various components that apply to the entitlements (role, department, priority, and so on).

• Warranties:

  You define the duration of the warranty and the entitlements that are owed to customers with covered products. You can associate warranties with items on the Item Definition page. For specific items that are installed at a customer's site, you can activate the warranty on the customer's installed product by using the Installed Product component.

  Note. Warranties are not listed for PeopleSoft HelpDesk agreement search results

When searching for a customer's entitlements for a case or a service order that references an installed product, the CRM system matches agreements and warranties based on response time — either ascending or descending depending on setup option in Agreement Search Configuration page.

This diagram shows the data model for agreements and shows the relationship between agreements and warranties:
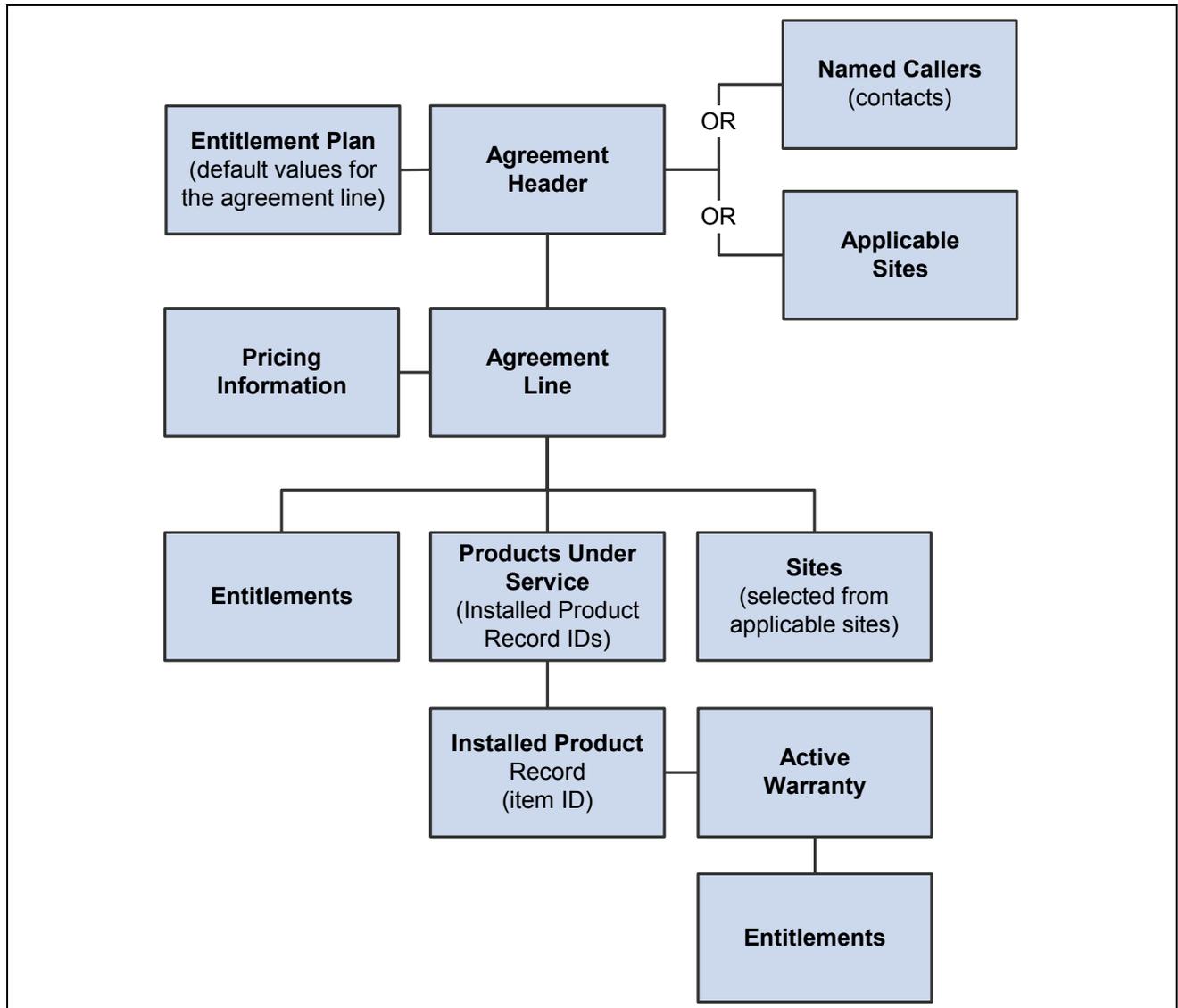
Agreement data model

See Also

Default Agreements

PeopleSoft CRM enables you to create two types of default service level agreements:

• Non-customer specific agreements:

These types of agreements do not have any specific customers associated with them. They apply to all customers. For example, assume you create an agreement for a specific customer called ABC Enterprises and then create another agreement that is non-customer specific. Both of these agreements would potentially apply to a case that is opened for ABC Enterprises.

Only the non-customer agreement would apply to a case opened for another customer. The non-customer specific agreement may have agreement lines that specify a particular service or a service and product combination (for use in PeopleSoft Integrated FieldService). They may also specify lines for a particular product or list of products (for use in PeopleSoft Support) or specify levels of support that apply as default levels regardless of the service or product on the case.

Because they apply to all services and all products, these lines would not have a specific service or product associated with them. A non-customer specific agreement cannot have pricing data associated with it, except you can write-in values of *free* for prepaid quantities.

The user may enter a number in the Prepaid Quantity field and select a value (case, service order, or hour) in the Prepaid Unit field, both of which would define the number of free units (either cases, service orders, or hours) that are associated with that agreement. The idea is that the user gets a certain quota of free services automatically with the default agreement as represented in the Prepaid Quantity and Prepaid Units fields.

You must define non-customer specific agreements with the agreement category of *External – No Pricing*.

• Customer-specific agreement.

These agreements contain agreement lines with no product and no service and are only valid for agreements with the *External - No Pricing* agreement type. An agreement that lists a specific customer may also contain default lines with no service and no product. These agreements are meant to apply to all cases and service orders, regardless of the service or product value of the case or service order. This means that a default agreement line with associated service level entitlements can be associated for a particular high-value customer to cover all its cases, perhaps at a higher service level than provided for in a non-customer specific agreement default line. A default line on a customer-based agreement that has no product and no service cannot be priced.

Note. Only customer-specific agreements are shown on the agreement section of the 360-Degree search page for a particular customer.

Understanding Agreement Pricing

This section discusses:

• Pricing record retrieval.

• Line price calculations.

• Total price calculations.

• Price recalculations.

• Uncoupling service pricing from an agreement.

Note. You can use PeopleSoft CRM to calculate agreement prices. In PeopleSoft Support, agents can accept payment by credit card at the time of the transaction regardless of whether an agreement is associated with the support case.

Pricing Record Retrieval

The CRM system can retrieve five types of pricing records for the agreement line: agreement, agreement service, agreement case, on demand service, and on demand case.

Agreement pricing records define the fee that is paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. Agreement service pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed—that is, the price paid per transaction that is covered by a line item in the agreement. Likewise, agreement case pricing defines the amount payable by the customer for logging a case.

The CRM system only retrieves pricing records that are defined for the currency that is specified when you define the agreement. You cannot change the currency unless you clear the defined line pricing values.

For field service agreements, you define pricing records for a service or a service and product combination. When you create a line for a field service agreement, you can retrieve the price for the agreement. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria that you enter is used to calculate the base line price for the agreement line.

The rate for the agreement service pricing record that matches your criteria becomes the transaction price for work that is covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement pricing and agreement case pricing records that define support rates for specific products. When you create a support agreement, the same logic (used in field service agreements) is also used in support agreement to retrieve base line price.

See Also

Chapter 26, "Defining Pricing Information for Services and Support Offerings," page 431

Line Price Calculations

This section describes line pricing calculations in detail.

Entitlement Adjustment

The CRM system adjusts the base line price or prepaid rate that is retrieved from the pricing record to account for uplifts and discounts that are associated with the entitlements on the agreement line. The uplift and discount percentage values are totaled and applied to the base line price using this formula:

Entitlement Adjusted Base Line Price = Base Line Price x (1 + (sum of entitlement discount and uplift percentage values))

For example, the CRM system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10 percent, the second an uplift of 15 percent, and the third a discount of 5 percent. The entitlement-adjusted base line price is calculated as:

Entitlement Adjusted Base Line Price = 100 USD x (1 + (0.1 + 0.15 - 0.05)) = 100 USD x 1.2 = 120 USD

Installed Product Quantity

When the agreement purchase option is flat, the entitlement-adjusted price on the agreement line applies to each installed product that is covered by the agreement line. The applicable installed products are listed on the Agreement Line page. To determine the installed product quantity, the CRM system adds the values in the quantity field of each referenced installed product.

Flat Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a flat purchase option, PeopleSoft CRM:

1. Calculates the base line price by adjusting the rate on the agreement pricing record for the number of installed products and agreement duration.

For example, if the pricing record rate is $20 per year per installed product, the agreement line duration is two years, and there are three installed products, the base line price is $20 x 2 x 3 = $120.

2. Adjusts the base price for entitlement adjustments.

3. Applies any manual adjustments.

    Manual adjustments are either expressed as a percentage or as a dollar amount.

This formula is used:

Final Line Price (for flat rates) = Base Line Price x Entitlement Adjustment + Manual dollar amount adjustment or x Manual percentage adjustment

Prepaid Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a prepaid purchase option, the CRM system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate does not vary with the duration of the agreement, so there is no need to adjust the base line price to account for agreement duration. The final line price is calculated as:

Final Line Price (for prepaid rates) = Prepaid Rate *x* Prepaid Quantity *x* Entitlement Adjustment

Any manual adjustments that exist for the line are also applied to the final line price.

Total Price Calculations

The total price is calculated by adding the final line prices on the associated agreement lines. Additionally, a final uplift or discount percentages can be applied to the base price of the agreement. For example, if the CRM system calculates a base price of 2,000 USD for the agreement and you have entered a discount of 10 percent, the CRM system calculates a total price of 1,800 USD for the agreement.

Price Recalculations

If you modify the entitlements on an agreement line, change the installed product quantity for an agreement line, or update the start and end dates of the agreement line after agreement line pricing has been calculated, the change you made is not automatically reflected in the final line price, though edit messages issued when the user saves a changed agreement will prompt the user to have the system update the price or leave the price unchanged.

In other words, if the values of the variables (for example, entitlement adjustment and agreement duration) that are used to calculate the current final line prices do not match the ones that are captured for the new calculation, the price of the agreement is no longer accurate. You can then recalculate the final price for the agreement lines as needed and update the total agreement price for the agreement.

Uncoupling Service Pricing from an Agreement

PeopleSoft CRM enables you to uncouple service pricing from an agreement for PeopleSoft Support and PeopleSoft Integrated FieldService. This allows you to define prepaid agreement with zero pricing, without having to set up service pricing first.

In addition to the *External* and *Internal* agreement categories, PeopleSoft CRM added a agreement category called *External – No Pricing*. This category allows you to set up prepaid agreements without pricing. To create a flat zero dollar agreement, you can use either the *External* or *External – No Pricing* agreement category.

PeopleSoft CRM, however, recommends using the *External – No Pricing* agreement category, as the system bypasses the pricing logic and does not display a pricing warning message. This allows you to create an unlimited number of cases or service orders. To create a prepaid agreement with no pricing, use the *External – No Pricing*category. The system hides the Order Capture Created check box in the agreement header, but you can still define prepaid purchase options.

By having the Prepaid Quantity field on the agreement header level, it allows you to have a pool of prepaid quantities per agreement across agreement lines. The system displays the prepaid fields only when the category is *External – No Pricing*.

Once a prepaid agreement is active and used on a case or service order, changing the prepaid quantity will not do anything. The system sets the Prepaid section to read only after the agreement has been used by the case or service order, when the remaining quantity is less than the prepaid quantity. When the agreement is renewed, the system uses the same prepaid quantity, remaining quantity, and prepaid total as the old line.

The Product grid displays the prepaid purchase option defined for each product. The prepaid option at the agreement header level and the Product grid level cannot coexist, however. You need to either define the total pool of prepaid purchase options for the whole agreement or the prepaid purchase options per product.

In addition, you can define the prepaid option on the line level for service-related agreements. For service-related agreements, the prepaid option can only be specified on the agreement header, line level, or product level. For support-related agreements, you can only specify the prepaid option on the agreement header or the product level. The prepaid option on the line level doesn't apply to support-related agreements, it only applies to service-related agreements.

Understanding How Agreements and Entitlements are Used in PeopleSoft Order Capture

The standard method of selling services is through a service agreement. In PeopleSoft CRM service agreements include installation services, maintenance services, and support services.

PeopleSoft provides the ability to associate a product with a service agreement, associate multiple products with the same service agreement, and drive the upsell offering of agreements when purchasing other products.

Users can purchase or renew agreements through PeopleSoft Order Capture and Order Capture Self Service.

Within a single agreement template line, you may define a product ID once (unless it is tied to different services). When agreement template lines contain multiple services for the same product ID, the customer must purchase all services. The agreement duration (start and end date), however, is not editable from the order.

Here is how the system calculates start and end dates for new and existing agreements:

• New Agreements:

For new Agreements the start date is today's date by default on the order. The start date is editable from the order. Based on the default start date or the start date entered by the user and the duration of the corresponding agreement template, the system calculates the end date.

When ordering an agreement in Order Capture, the system defaults the start date to the current date (this can be changed by user). The agreement template referred to by the order will have a duration. This duration is used in conjunction with the agreement start date on the order to calculate the new agreement's end date.

• Existing Agreements:

The system automatically fills in the end date with the end date of the existing agreement. Regardless of the start date, the end date for an existing agreement is not recalculated. The system uses the Duration fields on the Agreement Template page and the system date to calculate the start date for the service the user is purchasing.

When purchasing an agreement, the purchaser or the customer service representative (CSR) cannot modify the entitlements that appear on the template.

You may associate an agreement template with multiple products; however, if you have an integration to PeopleSoft Contracts that you activated on the Installation Options – Billing and Pricing Options page, you can only have one product per agreement template line. If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid of the agreement line.

Service Agreements do not necessarily cover all products available in the catalog. Pricing an agreement is dynamic in that it depends upon which products are being covered on the order by the agreement. The system does not allow Order Capture self-service users to link their purchased agreements to existing installed products. Self-service users need to call a CSR to use this functionality.

The system also does not allow Order Capture self-service users to add products to existing agreements. When internal Order Capture users select an existing agreement to add lines to, the system makes the end dates of the new lines the same as the end dates of the existing lines. PeopleSoft CRM does not maintain differing end dates on an order capture agreement. This facilitates the renewing of the agreement as all lines will expire at the same time.

Note. PeopleSoft Order Capture limits the user to one agreement per standard product ordered. For example, if a user orders a computer and the computer is covered by two agreements on the order, the computer can only be covered by one or the other agreement, but not both.

Defining Service Levels

This section provides an overview of service levels and service level suspensions and discusses how to:

• Define service levels.

• Create additional cost categories for the service level.

Understanding Service Levels

You can define the hours of operation or prime period of maintenance for the services that your organization offers. For example, you may provide some services only during a 40-hour workweek, whereas other services may be provided 24 hours a day.

You can define entitlements for specific service levels, which can then be included on a customer's agreement. When a case or service order is covered by an agreement line with a service level entitlement, agents can use the service level information to determine required start dates and times for the work.

Note. In general, you can define service levels for each time zone that is covered by your organization. PeopleSoft, however, strongly recommends that you not reset the base time zone in PeopleTools after your system is running and your applications are in production. Resetting the base time zone can cause time reports to be incorrect.

If you reset the base time zone (go to PeopleTools, Utilities, Administration, PeopleTools Options), your users will need to recreate all time-frame related data and update each record to reset the correct time frame for the new base time zone. Users can change the time zone for a particular agreement if they want to display time differently. If users continuously change time zones, however, the system will lose track of what the base time zone is at the time the record is saved (since all time-zone related fields on PeopleTools are stored against the base time zone).

Pages Used to Define Service Levels

Page Name	Object Name	Navigation	Usage
Service Level	RF_SERVICE_LEVEL	Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level	Define the authorized hours of operations or prime period of maintenance. These service levels are informational only.
Cost Category Definition	RF_SLVL_COSTCAT	Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition	Create additional cost categories for the service level.

Defining Service Levels

To define service levels, use the Service Level (RF_SERVICE_LEVEL) component.

Access the Service Level page.

Service Level page (1 of 2)

Service Level page (2 of 2)

Service Level	Displays the name of the service level that you entered when the service level record was created.
Description and **Short Description**	Enter a long and short description. Because these descriptions are displayed in entitlements in which the service level is referenced, enter a meaningful service level description.
Time Zone	Select the appropriate time zone for the authorized hours of operations that you define for the service level. The CRM system populates the time zone code that you select next to the time values that you enter in the Defaults and Service Level Details group boxes. After you save the service level record, the time zone for the service level cannot be changed.
Cost Category Code	Select the cost category code that should apply for work performed during the days and times specified on this page.
Holiday Schedule	Select the holiday schedule that you want to apply to the service level. The system takes holidays into account when calculating required start and end dates for scheduled work.
	By default, the system places the holiday schedule after the Entitlement grid on the Agreement Line page. Users can override it or clear it out. For platinum customers you can override holiday schedules by clearing them out on agreement lines.
	The holiday schedule is based on specific dates, so each year you need to modify your existing holiday schedules with new dates or create new ones to re-prompt from the service level and agreement lines. PeopleSoft CRM recommends that administrator update existing dates, especially when re-prompts may affect a large number of agreement lines.

Defaults

Enter the begin and end times for the weekdays and weekend days that you want the system to use for the service level. When you click the Apply Defaults button, the system enters the hours in the appropriate fields displayed in the Service Level Details group box.

Service Level Details

This group box displays the begin and end times for the days of the week associated with the service level. You may change the hours displayed in the fields or clear them all by clicking the Clear button.

Create Additional Cost Categories for the Service Level

Access the Cost Category Definition page.

Cost Category Definition page

If you charge different rates for the hours and days worked that were not defined on the Service Level page, use the fields on this page to define additional days, hours and cost categories.

For example, if you charge time-and-a-half for work performed on Saturday, select *Saturday* from the Day of the Week field, enter the hours in the Start Time and End Time fields, and then the select *HALF* as the cost category.

Defining Entitlements

This section provides an overview of entitlements and discusses how to define entitlements.

Understanding Entitlements

You define an entitlement record for every response time, restore time, coverage type, or service level that your company intends to offer on customer agreements or warranties. By using the Agreement component, you select the entitlement records that describe what the customer is contractually owed for the service or support offering on each line of the customer's agreement.

Similarly, when defining warranties with the Warranty component, you select the entitlements that are contractually owed to customers who have an installed product that is covered by a valid warranty.

Each entitlement record can specify an uplift or discount to adjust the base price of agreement lines that include the entitlement. When the CRM system calculates the final line price of the agreement line, it adjusts the base line price to reflect the sum of the uplift and discount values that are associated with the entitlements on the line.

Page Used to Define Entitlements

Page Name	Object Name	Navigation	Usage
Entitlements	RF_ENTITLEMENTS	Set Up CRM, Common Definitions, Entitlements, Entitlements, Entitlements	Define entitlements that can be offered on agreements and warranties.

Defining Entitlements

To define entitlements, use the Entitlements (RF_ENTITLEMENTS) component.

Access the Entitlements page.

Entitlements page

Description	Enter a description. You can use up to 30 alphanumeric characters.

Important! Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that are meaningful to the person who enters the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level that is contractually owed to the customer per the specified agreement line or warranty. For example, you may want to include the time zone of a service level in its description.

Uplift/Discount   Enter the percentage of uplift or discount to add to the price of agreement lines that include this entitlement. Enter discounts with a minus sign that precedes the amount; enter uplifts without a minus or plus sign.

Entitlement Type

Specify the category of entitlement that is defined by the entitlement code together with the entitlement details that are associated with the selected category.

Guaranteed Response and **Minutes**
Select to entitle the customer to a response within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed response time to calculate the start date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred start date and time for service orders based on this information.

Guaranteed Restore and **Minutes**
Select to entitle the customer to restored functionality of the product within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed restore time to calculate the committed end date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred end date and time for service orders based on this information.

The service order can have several types of begin and end times. The guaranteed restore entitlement is used to calculate the committed end date and time. Other end times include *customer preferred,* which are optional fields that are manually entered if the customer has a preferred date and time for service, such as a weekend. There are also *planned* end dates and times, which refer to the expected completion of each activity within a service order that are based on service begin type and activity duration.

Service Level
Select to entitle the customer to a specific service level or prime period of maintenance. Service levels are established on the Service Level page. PeopleSoft Integrated FieldService uses the service level that is specified in the entitlement to calculate the start and end dates and times for service orders, if the automatic calculation feature is enabled at the business unit level.

Guaranteed Coverage
Select to entitle the customer to a percentage of a specific type of coverage for a specific amount of time. When defining an entitlement for guaranteed coverage, select a coverage type, define the percent covered, and specify a time frame by entering a numeric value in the Length field and defining an appropriate unit, either *Day, Week, Month,* or *Year.*

Coverage Type
Select a coverage type if you select *Guaranteed Coverage* as the entitlement type. Values are:

Expenses: The portion (specified in the Percent Covered field) of any expenses that are associated with completing the customer's service order that is not charged to the customer.

Material: The portion (specified in the Percent Covered field) of the cost of any materials that are required to complete the customer's service order that is not charged to the customer.

Time: The portion (specified in the Percent Covered field) of the cost of any labor required to complete the customer's service order or case that is not charged to the customer.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders," Setting Up Automatic Calculation of Dates and Times for Service Orders

Defining Entitlement Plans

This section provides an overview of entitlement plans and discusses how to define entitlement plans.

Understanding Entitlement Plans

Use entitlement plans as default values on agreements or warranties. You can reference a relevant entitlement plan to quickly populate an agreement or warranty with the entitlements that are associated with the plan. You can then delete or add other entitlements as necessary.

Page Used to Define Entitlement Plans

Page Name	Object Name	Navigation	Usage
Entitlement Plan Setup	RF_ENTITLE_PLAN	Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup	Define groups of entitlements that can be referenced and populated quickly on agreements and warranties.

Defining Entitlement Plans

To define entitlement plans, use the Entitlement Plan Setup (RF_ENTITLE_PLAN) component.

Access the Entitlement Plan Setup page.

Entitlement Plan Setup page

You can create new or update existing entitlement plans by adding or removing entitlement entries from the plan. When you reference an entitlement plan on an agreement, the system automatically populates the plan's associated entitlement entries to the agreement.

The system, however, does not retroactively update individual entitlements on existing agreement lines or warranties when the corresponding entitlement plan used to create those entries is updated.

For example, if an agreement line was created with an entitlement plan which originally had a response entitlement of *A* and a restore entitlement of *B,* and that plan is subsequently changed to refer to a restore entitlement of *C* rather than *B,* the existing agreement line will still have the original two entitlement values.

Entitlement Plans are only used to default individual entitlements onto other new objects, such as agreement lines or warranties. These individual entitlements may then be modified by the user at any time, and are no longer determined or reset by any changes to the corresponding entitlement plan.

Note. An entitlement plan must have at least one entitlement associated with it.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 386

Configuring the CRM System for Agreement Searches

This section provides an overview on agreement searches and discusses how to configure agreement searches.

Understanding Agreement Searches

The Agreement Search Configuration page allows you to configure how the agreement search should function for PeopleSoft Support cases (external case agreement search), PeopleSoft HelpDesk cases (internal case agreement search) and PeopleSoft Integrated FieldService service orders (service order agreement search).

For external and internal agreements, there are separate group boxes for cases and service order that allow you to instruct the system on how to search for agreements using these options:

• Autoselect the shortest response time from all matches.

• Autoselect the longest response time from all matches.

• Allow the user to choose from all matches.

• Match using case criteria.

If you select Match Using Case Criteria for external agreements (PeopleSoft Support), the system enables you to select case category, case priority, case source, case type, and customer value as the values for the Category field.

If you select Match Using Case Criteria for internal agreements (PeopleSoft HelpDesk), the system enables you to select department, location, priority, role, and source (inbound contact method) as the values for the Category field.

If you do not select the Match Using Case Criteria check box, the system performs the matching based on the radio button you selected. This means that if any agreement lines exist that specify values (criteria), the agreement matching engine ignores those values when selecting matches.

If you select the Match Using Case Criteria check box, the pool of agreement line matches will include any matches based on the criteria in the case and the corresponding criteria on the agreement lines. If two or more lines tie for the shortest or longest response, the system displays all agreement lines to the user.

To be considered a match, the criteria from a case may match any of the criteria conditions listed on the agreement line. For example, if an internal agreement line specifies that it is for high priority cases and the role is supervisor, the system matches the case with this line if the employee's role is supervisor, regardless of whether the case priority is high or not.

If a product is specified on the case, the system matches only agreement lines that have the product and at least one criteria. The system will also match default agreement lines that have no products that match on at least one criteria (if any criteria are present on the agreement line).

The system then filters the pool of agreement lines (and warranties) that are found under this option for presentation to the user according to the radio button option that was selected on the Agreement Search Configuration page.

Note. Because PeopleSoft CRM no longer bases search results on the category weight factor, customers upgrading from a previous release may find that the agreement searching functionality for PeopleSoft HelpDesk may produce slightly different results. Also, now that the system sorts the total list of warranty and agreement line matches by response time, warranty matches do not always appear first in the list of results.

You can use a variety of agreements and agreement line values to set up your PeopleSoft CRM system. These tables summarize the main options that are available:

External Agreement Line Characteristics	Comments
• No Product • No Service • No Installed Product • No Criteria	This default agreement line will always apply regardless of the product or installed product that is linked to the case or service order. This line cannot be priced. It is permitted only for the External - No Pricing agreement category.
• Product = 123 • No Service • No Installed Product • No Criteria	This agreement line applies to any case for product 123, regardless of the installed product value on the case.
• Service = ABC • No Product • No Installed Product • No Criteria	This agreement line applies to any service order, assuming that a service has not been selected on the service order. If a service has already been selected on the service order, this agreement line will only be a match if the service is the same in both places. **Note.** The Service ID from a service order will be included as part of the matching criteria when selecting entitlements from the service order.

External Agreement Line Characteristics	Comments
• Product = 123 • Installed • Products = 456, 789 • No Service • No Criteria	This agreement line applies to any case with matching product and installed product values.
• Product = 123 • No Service • No Installed Product • Priority = Medium • Customer Value = Silver	This agreement line applies to any case for the product (regardless of the installed product) where the case priority is medium or the customer value is silver.
• Product = 123 • No Service • Installed Products = 456, 789 • Priority = High • Customer Value = Gold	This agreement line applies to any case that is linked to product 123 and installed product 456 or 789, where the case priority is high or the customer value is gold.
• No Product • No Installed Product • No Service • Priority = High	This agreement line applies, regardless of whether the product or the installed product is linked to the case, as long as the case priority is high. This line cannot be priced.
• Product = 123 • Service = Repair Widget • No Installed Product • No Criteria	This agreement line applies to any service order for product 123, regardless of the installed product, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget*.
• Product = 123 • Service = Repair Widget • Installed Product 456, 789 • No Criteria	This agreement line applies to any service order for product 123 and installed product 456 or 789, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget*.

Note. Customer, PIN, Person, SIN and Site Matching also apply for customer-based agreements in addition to comments in the table above.

Internal Agreement Line Characteristics	Comments
• No Product • No Installed Asset • No Criteria	This default agreement line applies, regardless of the product or installed asset that is linked to the case.
• Product = 123 • No Installed Asset • No Criteria	This agreement line applies to any case for the product, regardless of the installed asset value on the case.
• Product = 123 • Installed Assets = 456, 789 • No Criteria	This agreement line applies to any case that matches the product and installed asset values.
• Product = 123 • No Installed Asset • Priority = Medium • Source = Phone	This agreement line applies to any case that is linked to the product (regardless of installed asset), where the case priority is medium or the source is phone.
• Product = 123 • Installed Assets = 456, 789 • Priority = High • Department = HR	This agreement line applies to any case that is linked to product 123 and installed asset 456 or 789, where the case priority is high or the department is HR.
• No Product • No Installed Asset • Priority = High	This agreement line applies, regardless of the product or installed product that is linked to the case, as long as the case priority is high.

Page Used to Configure Agreement Searches

Page Name	Object Name	Navigation	Usage
Agreement Search Configuration	RF_AG_SRCH_CFG	Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration	Define how the system will search for agreements.

Configuring Agreement Searches

Access the Agreement Search Configuration page.

Agreement Search Configuration page (1 of 2)

Agreement Search Configuration page (2 of 2)

Note. The group boxes that appear on this page are dependent on which PeopleSoft applications you have installed. For example, the External Case Agreement Search group box appears only if you have PeopleSoft Support installed. The Internal Case Agreement Search group box appears only if you have PeopleSoft HelpDesk installed. The Service Order Agreement Search group box appears only if you have PeopleSoft Integrated FieldService installed.

External Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link on the Case page in PeopleSoft Support.

The values include:

• User Selects From All Matches

   The system displays all matches in the pool of agreements or warranties.

- Autoselect Shortest Response

  The system displays only the matches from the pool of agreements or warranties with the shortest response.

- Autoselect Longest Response

  The system displays only the matches from the pool of agreements or warranties with the longest response.

Match Using Case Criteria and **Category**	If you do not select the Match Using Case Criteria check box, the system performs the agreement search based on the radio button that you select.
	If you select the Match Using Case Criteria check box, the system includes agreement lines that match the criteria that you select in the Category field and the radio button that you select.
	For example, if case priority and customer value are listed on the Agreement Search Configuration page, and the agreement line specifies it is for *high* priority cases, or cases whose customer value is *platinum,* the system still matches a high priority case to this agreement line regardless of customer value. The case criteria on an agreement line don't all have to match the values on a case to be considered a match. It is sufficient for just one criteria to match.
	If a product is specified on the case, the system matches only agreement lines that match the product and at least one criteria.
	The system matches agreement lines to the case for default agreement lines that have no products but match on at least one criteria, if any criteria are present on the agreement line.

Internal Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Case page in PeopleSoft HelpDesk.

The system returns all applicable default lines even when there is another match based on product or installed product. PeopleSoft designed the system to do this to give agents the option of selecting an agreement based on a completely different criteria.

For example, if you have one agreement line that covers a pocket PC and another default line to cover the role of CEO that does not have a product specified but has a better response time, the system displays both lines. This gives the agent the ability to select either line.

If you select the Match Using Case Criteria check box, you must select one or more categories that you want the system to use in its search. Refer to the previous section for a fuller explanation on using the Match Using Case Criteria and Category fields.

Service Order Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Service Order page in PeopleSoft Integrated FieldService.

Defining Agreement Templates

To define agreement templates, use the Agreement Template (RF_AGREETEMP) component.

This section provides an overview of agreement templates and discusses how to:

- Define basic header and billing information for agreement templates.

- Define default entitlement sets.

- Define default agreement lines.

- View and access linked product definitions.

Understanding Agreement Templates

You can define model agreements for specific types of customers, products, or services. When you define an agreement for a specific customer by using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

Note. You can create templates with specific values for certain agreement criteria. However, if you create more than one agreement from the same template, you should change at least some of the criteria that you copied from the template; otherwise, you would have two identical agreements in your system.

Pages Used to Define Agreement Templates

Page Name	Object Name	Navigation	Usage
Agreement Template	RF_AGREETEMP_HDR	Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template	Define basic header and billing information for agreement templates.
Line Defaults	RF_AGREETEMP_ENTL	Customer Contracts CRM, Agreements, Agreement Templates, Line Defaults	Define a set of entitlements to use as default values for the entries that are added on the Template Line page.
Template Line	RF_AGREETEMP_LINE	Customer Contracts CRM, Agreements, Agreement Templates, Template Line	Define default agreement lines.
Related Products	RF_AGREETEMP_PROD	Customer Contracts CRM, Agreements, Agreement Templates, Related Products	View and access linked product definitions.

Defining Basic Header and Billing Information for Agreement Templates

Access the Agreement Template page.

Agreement Template page

| Agreement Category | This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. |
| | For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* or *External - No Pricing* as the agreement category. |

Note. If you select *External - No Pricing* as the agreement category, the system only displays the Status Information and Coverage sections.

Internal Agreement Type

This group box appears only if you select the *Internal* agreement type. Select one or both of the HR Help Desk or IT Help Desk check boxes to designate the types of cases to which the agreement applies.

Status Information

Use the fields appearing in this group box to select the scope and status for the agreement template you are defining.

Note. If you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category, only the Status field appears on this page.

| Scope | Select either *Site* or *Contact* to indicate the scope of the agreement template. If you select *Contact,* enter the number of contacts in the Maximum Contacts field. |

Note. When Available for Ordering is selected as an option in the Order Capture group box, the system only allows *Site* as the scope for agreement templates. This is because PeopleSoft Integrated FieldService only uses *Site* as the scope for this type of agreement for service orders. PeopleSoft call center applications can use either *Contact* or *Site* as the scope.

Status	Select the status of the agreement: *Pending, Active,* or *Closed.* There are no system processes that change the status value of the agreement template, but you can manually change the status as necessary. You can only use templates with a status of *Active* to create a new agreement.

Coverage

Select the provider group and provider group member that you want the system to use for the agreement template.

Billing Information

Select the payment terms and payment method that you want the system to use for billing for agreements using the agreement template.

Order Capture Information

Available for Ordering	Select to indicate if the agreement template may be sold through PeopleSoft Order Capture.
Duration	Enter the duration for the agreement template.
	Since start and end dates cannot be added to the template and the start and end dates are one of the attributes used to price an agreement line, the system uses the Duration field to calculate start and end dates. As such, agreements created from the template will have their own start and end dates.
	The system uses the current system date to set the agreement line start date (or the override start date on the order). The system adds the duration to the start date to calculate the end date.
Product and **Product ID**	Select *Create New* if you want the system to create a new product from the agreement template to represent that template. The system creates a new product ID value when you save the new template. The system sets the description of the product to the template ID. It also sets the service flag on the product to Y for Yes. This allows the agreement to be selected (referenced by product ID) on an Order Capture order.
	Select *Use Existing* to select a product from the Product ID field.

Note. If autonumbering is turned off, the system returns an error message when you attempt to save the template.

See Also

Defining Default Entitlement Sets

Access the Entitlement Defaults page.

Line Defaults page

| Entitlement Plan Name | Select a default entitlement plan. Plans are established on the Entitlement Plan Setup page. The system displays the entitlements in the plan. You can add or delete entitlements to create a specific list for this template.

The PeopleSoft CRM system displays the information that is associated with each entitlement as defined on the Entitlements page. |

Note. Setting up plans is optional. You can add individual entitlements directly to the grid. The individual entitlements listed on this page will be defaulted onto each new agreement template line entry that is created from that template.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 386

Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 389

Defining Default Agreement Lines

Access the Template Line page.

Template Line page

Agreement Line Details

Add rows for each new line.

Line Number	Displays the agreement line number. The CRM system automatically increments this number for each row that you add. The agreement line number and description appear on cases that are covered by the agreement line entitlements. Service orders only display the agreement name, not line number.
Service	Select the service that is covered by the agreement line. For field service agreements, select a service. Support agreements do not reference services. You define services by using the Service component.
	The PeopleSoft CRM system prompt displays only services with an active status and for which the Agreement check box has been selected on the Service page.

Note. Since there is no start date on the Template Line page, the system validates that the agreement start date occurs between the offer start date and the offer end date defined for the service on the Agreement Line page, not the Template Line page.

Internal agreement templates also require you to designate the person type and person status. The system uses these to select the agreements that apply to the case. For example, if a contingent worker in active status opens an IT Help Desk case, only agreement lines that have a person type of *Contingent Worker* and a status of *Active* apply.

Service Pricing Details

Define the default criteria for retrieving pricing records for an agreement line.

Purchase Options	Select the purchase options that you want the system to use for the agreement template.

Prepaid Quantity   Enter the number of work units of a service or support offering that a customer pays for in advance. This value only applies to the *Prepaid* purchase option.

Product, Purchase Options   Select the product covered by the agreement line, the purchase option, and
and **Prepaid Quantity**   the prepaid quantity.

                                  If you select a service, the CRM system prompt displays all the products that are defined for the service. If no service is selected, the system prompt displays all products that are defined in it.

                                  Products are established with the Product enterprise integration point (EIP) or the Product Definition component.

Entitlements

Displays the entitlements that are contractually owed to the customer for this agreement line. This information is initially populated by using the Entitlement Defaults page. The user, however, can modify the entitlements for each line.

Note. If you select the Available to Order field on the Agreement Template page, the system hides the Add row and Delete row buttons on the Entitlements grid. The system copies the entitlement information from the Entitlement Defaults page to each new line. You cannot change these entitlements in the Entitlements grid. This is required to ensure that all template lines, regardless of the product ID entered for each template line will have the same set of entitlements.

This is important when performing a side-by-side comparison of products in the product catalog to determine which service agreement is the best fit for the product selected. Additionally, if you select the Available to Order field, the system defaults the Purchase Option field to *FLAT* and makes it read only, since flat fee is the only type of agreement fee PeopleSoft Order Capture uses for the purchase of agreements. Therefore, it is important to ensure that you have first created flat free prices for each service or product that you intend to use on an agreement template.

Entitlements Apply To

This group box appears only if you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category. Also, the system displays a set of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

For example, if you selected the Match Using Case Criteria check box and then selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that can appear on the Case page. For example, if you set the priority for the agreement to low, and a user selects the Select Agreement link on a low priority case, the system displays the respond and restore times that you set up on the Entitlement Defaults page.

If you select *User Selects From All Matches, Autoselect Shortest Response,* or *Autoselect Longest Response,* on the Agreement Search Configuration page, the system does not display this group box.

See Also

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

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services," Defining Services

Viewing and Accessing Linked Product Definitions

Access the Related Products page.

Related Products page

The Related Products page appears only if the template is being used with PeopleSoft Order Capture. The system uses the Related Products page to show all products that point to the template. The system does not display this page until you save the template and navigate to the page from one of the other pages in the Agreement Template component.

To access the Product Definition page, click the link under the Product ID field.

Note. If the Agreement Template is set to a closed status and there are active products in the Related Products tab, the system displays a warning message stating that there are active products associated with the Agreement Template and that inactivating the template may also inactivate the related products.

Defining Agreements

This section provides an overview of agreement definitions and discusses how to:

• Define agreement header information.

• Specify people or sites that are entitled to service or support.

• Specify line defaults.

• Define detailed agreement line information.

• Define billing information.

Understanding Agreement Definitions

When you create a case or service order for a customer and click the Select Agreement or Warranty button, the CRM system searches for agreement lines or warranties that cover the case or service order and displays the associated entitlements.

The CRM system uses the values that you have entered in the fields for product ID, serial number, and either site or SIN to search for agreement line and warranty matches for service orders.

For cases, the CRM system uses the same fields, as well as those for contact or PIN. For both cases and service orders, the entitlement match page also displays any transaction price information that is defined under the terms of the agreement.

Internal agreements define the levels of service that are available to Help Desk and HR Help Desk cases. These cases use the additional information of organizational relationship, as defined by the person type, and worker status to locate and display the levels of service that are defined on the agreement.

External - No Pricing agreements are similar to External agreements, except they do not display pricing-related fields, only prepaid amounts. Using External - No Pricing agreements enables you to specify how many free prepaid cases or services, or hours of support, a customer is entitled to on an agreement. For PeopleSoft Support, you can specify *prepaid* at the agreement header level or in the product grid on the agreement line. For FieldService, you can specify *prepaid* on the agreement header, agreement line for service, or on the product grid on the agreement line.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders," Service Order Toolbar Functions

Pages Used to Define Agreements

Page Name	Object Name	Navigation	Usage
Agreement	RF_AGREEMENT_HDR	Customer Contracts CRM, Agreements, Agreements, Agreement	Define agreement header information.
Scope Details	RF_AGREEMENT_COV	Customer Contracts CRM, Agreements, Agreements, Scope Details	Specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines.
Line Defaults	RF_AGREEMENT_ENTL	Customer Contracts CRM, Agreements, Agreements, Line Defaults	Specify the default values to appear on rows that are added on the Agreement Line page.
Agreement Line	RF_AGREEMENT_LINE	Customer Contracts CRM, Agreements, Agreements, Agreement Line	Define detailed agreement line information for each service or support offering.
Billing	RF_AGREEMENT_BILL	Customer Contracts CRM, Agreements, Agreements, Billing	Define agreement billing information.

Defining Agreement Header Information

Access the Agreement page.

Agreement page (1 of 3)

Agreement page (2 of 3)

Agreement page (3 of 3)

Agreement Category	This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select either *External* or *External - No Pricing* as the agreement category.

Note. In the top section of this page the system changes the field label to Category.

Copy From Agreement Template

When you create a new agreement, you can either add all the information to it manually, or base it on an agreement template.

Note. This group box does not appear if the agreement has already been created and saved.	

Copy from Template and **Template ID**	Select a template and then click the Copy from Template button to populate the agreement with information that is established in the selected agreement template.
	Note. Because the integration with PeopleSoft Contracts requires certain validations before a user can set the status of an agreement to *Active,* the system does not copy the value of the Status field from the agreement template to the new agreement. The system initially sets the status of the new agreement to *Pending.*
	A user can change the status of the agreement to *Active* by taking certain actions; but they cannot create a new agreement with a status of *Active* by copying information from an agreement template.

Agreement Information

Renewal Number	Displays the renewal version of the agreement. When an agreement is first created, this value is set to *1.* Each time you renew the agreement by clicking the Renew Agreement button, the CRM system increments this value by 1.
Scope and **Maximum Contacts**	Select either *Site* or *Contact* to indicate if the agreement applies to sites or callers (contacts). If you select *Contact,* enter the maximum number that would be allowed to call within the scope of the agreement.
	Note. These fields do not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.
Status	Select from *Pending, Pending Activation, Action Required, Active,* or *Closed.*
	There are no system processes that change the status value of the agreement, but you can manually change the status. When an entitlement search is performed for a case or a service order, the CRM system includes only agreements with an *Active* status that are effective on the date that the search is performed.

Note. When renewing an agreement, you should manually adjust the status of the old agreement to *Closed* on the date that it expires and ensure that the status of the new agreement is set to *Active.*

For example, if you renew an agreement one week before it expires, the new agreement should have a status of *Pending Activation,* and the old agreement should retain its status of *Active* until the renewal date matches the current date. At that point the old agreement status should be set to *Closed,* and the new agreement status should be set to *Active.*

If you have an integration with PeopleSoft Transaction Billing Processor, the system makes the *Pending Activation* and *Action Required* statuses available. Additionally, if you are using this integration, the system changes the status from *Pending Activation* to *Active* or *Action Required* based on the success you have creating a corresponding entry in PeopleSoft Transaction Billing Processor.

Order Capture Created If this check box is selected the agreement was created through PeopleSoft Order Capture.

Contract Details Click this link to go the Contract Information page. Use this page to view contract information associated with the contracts business unit, general ledger business unit, and contract details. This applies only when integrating to the Contracts module in PeopleSoft Financials.

Internal Agreement Type

This section appears on the page for internal agreements only.

Customer Information

This section does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Customer Click the Search button to select the name of the customer. Customers are established by using the Customer EIP, the Company component (select Customers CRM, Add Company) or the Consumer component (select Customers CRM, Add Person).

Contact Click the Search button to select the name of the customer's agent. This is the person to contact about agreement administration issues, such as renewing and remitting payment for agreements.

You define contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component.

Contact Site Select the customer site that is associated with the contact. You establish this relationship by using the Customers page of the Contact component.

Note. The prompt for this field shows only sites that are associated with the contact.

Prefix, Phone, and Enter the telephone information for the customer's contact. If you select a
Extension contact, the CRM system populates these fields with the primary telephone

> information of the person's role as a customer's contact. You can modify
> this information as needed.

Contact Information

These fields appear on the page only if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

The contact fields on the main Agreement page for internal agreements are functionally similar to the customer contact fields mentioned above for external agreements. They refer to the person to contact about the agreement administration issues.

Some users may mistakenly assume that the contact listed on the main page of an internal agreement represents the person or worker for whom the agreement was created, or who was covered by the agreement. This field is only used to represent the administrative contact for the internal agreement.

First Name, Last Name, Phone, Location and **Search**	Click the Search button to select the name of the contact. You define contacts by using the Workforce component (select Workforce, Create Worker).
Prefix, Phone, and **Extension**	Enter the telephone information for the contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the contact. You can modify this information as needed.

Default Provider Group

Enter the default provider group and group member that get assigned to perform the services that are covered by this agreement.

Note. This group box does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Person Business Objects," Defining Consumer Information

Specifying People or Sites That Are Entitled to Service or Support

Access the Scope Details page.

Scope Details page

This page varies depending on the scope that is specified on the Agreement page. For agreements with the contact scope, you enter the people who are eligible for support. These agreements are only available to PeopleSoft Support. For agreements with the site scope, you enter sites that are eligible for service. These agreements are available to both PeopleSoft Support and PeopleSoft Integrated FieldService.

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Named Callers

This grid appears if the selected agreement has a scope of contact. Enter the people who are eligible to request support that is related to this agreement.

Primary	Select if this person is the primary caller.
Name	Enter the name of a person who is entitled to request support that is defined by the agreement lines. Named callers must first be established as contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. The number of contacts that you specify cannot exceed the number of maximum contacts that are recorded on the Agreement page.
	Note. For consumer agreements with scope as the contact, the CRM system populates the first row of the Named Callers grid with the name of the customer that is specified on the Agreement page. You can change this value or add additional rows.
PIN (personal identification number)	Displays a unique value that is generated by the CRM system for each caller when the agreement is saved. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The CRM system uses the PIN that the CSR enters on cases to identify the agreement that defines the customer's entitlements.
	Note. The PIN is unique for every person within an agreement. If a person is a named caller on two agreements, this person is assigned two PINs.

Valid Sites

This grid appears if the selected agreement has site as the scope. Enter customer sites that are eligible to receive support or services specified on its agreement lines.

Site Name	Enter the name of the site that is covered by this agreement. The CRM system displays the site ID of the selected site automatically.
SIN (site identification number)	Displays a unique value that is generated by the CRM system for each site when the agreement is saved. Customers calling to request service under the terms of the agreement provide the SIN to your CSR. The CRM system uses the SIN that the CSR enters on cases or service orders to identify the agreement line that defines the customer's entitlements for a particular site.

Note. The SIN is unique for every site within an agreement. If a site is valid on two agreements, the site is assigned two SINs.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Site Business Objects"

Specifying Line Defaults

Access the Default Entitlements page.

Line Defaults page (1 of 2)

Line Defaults page (2 of 2)

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Coverage Type, Percent Covered, Coverage Duration and Uplift or Discount fields. The group boxes with the Person Type and Worker Status check boxes shown in the example above is only relevant for and displayed for internal agreements. It is not displayed for external or external-no pricing agreements

Default Entitlements

Entitlement Plan Name	Select a default entitlement plan to populate the grid initially. You define entitlement plans on the Entitlement Plan Setup page.
	The list of entitlements in the grid becomes the default entitlement set for each new line that is added on the Agreement Line page.
	Add or delete entitlements on each agreement line to define the final set of entitlements that is contractually owed to the customer. Each line in the grid is associated with the entitlement information that is defined on the Entitlements page.
Description	Click the Lookup Entitlement Name button to locate entitlements that you want to add to the Entitlements grid.

Note. Any changes that you make to the defaults do not affect any existing agreement lines.

Additional Selections for Internal Cases

Person Type	Select the person type. Available choices are *Employee, Contingent Worker,* and *Person of Interest.*
	Note. *Person of Interest* does not appear for IT Help Desk cases.
Worker Status	Select the status of the worker.

See Also

Defining Detailed Agreement Line Information

Access the Agreement Line page.

Agreement Line - View Line Summary page

Agreement Line - Line Details page (1 of 5)

Agreement Line - Line Details page (2 of 5)

Agreement Line - Line Details page (3 of 5)

Agreement Line - Line Details page (4 of 5)

Agreement Line - Line Details page (5 of 5)

Agreement Line - Installed Products page

Agreement Line - Entitlements page

Agreement Line - Sites page

Agreement Line - Price Information page

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Sites and Price Information sub pages and links. If you selected *External - No Pricing* as the agreement category, the system does not display the Price Information sub page.

Agreement Line: View Line Summary

If an agreement has multiple agreement lines, they are listed in the Agreement Lines summary grid (available when you click the View Line Summary link) with basic information such as agreement line and service descriptions, product name, and product ID number. Click the agreement line number link to access the Agreement Line Details group box, where you can edit and view the corresponding line in detail.

If there is only one line in the agreement, the CRM system displays the Agreement Line Details group box together with pricing, site, entitlements, and product information.

When you click the Line Details link at the top of the page, the CRM system displays information for the selected agreement line in group boxes such as Retrieve Base Line Price, Calculate Final Line Price, Entitlements and so on. To minimize the need for scrolling, you can click the Sites, Entitlements, Installed Products, or Price Information links to view corresponding information selectively.

Agreement Line: Line Details - Agreement Line Details

Use this group box to add new lines to the agreement. Enter the status, start and end dates, description and service for the agreement service line. Click the Billing Information link to set up the billing schedule, purchase order, and payment terms information for the agreement line.

The Billing Information link only appears when the customer is integrating with the Contracts module in PeopleSoft Financials.

Note. For internal agreements (IT Help Desk and HR Help Desk), the Person Type and Worker Status fields also appear in this section.

Agreement Line: Line Details - Service Pricing

Use this group box to enter purchase option and transactional information for the agreement line service. Click the Price Definitions link to access the Service Pricing page.

Agreement Line: Line Details - Products

Use this section to define the products, purchase options, and prepaid quantity (if there is one). The system displays the prepaid rate, base line price, and base line price unit if it is stored in the system.

To view the transaction price for the product, click the Transaction Price tab. This section displays the transaction price on the corresponding agreement service pricing record. The price is based on the service or service-product combination that is defined for the agreement line.

The CRM system matches the value for the service and product fields on the agreement line with a unique pricing record that contains the same service and product values. In addition, this pricing record must contain the appropriate currency code for the agreement line. Never define more than one agreement service pricing record in the Pricing Information page for the same combination of service, product, and currency code, because this implies multiple prices for a single transaction.

You may associate a support-oriented agreement line with multiple products unless you have an integration to PeopleSoft Contracts. In this case you can only have one product per support-oriented agreement line (i.e. an agreement line with no Service). If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid for the agreement line.

After defining the product and purchase option (prepaid options, if applicable), the other price related fields on this grid are populated when the user clicks the Calculate Final Price button.

When you perform an entitlement search from a case or a service order, the CRM system displays the transaction price or the remaining quantity that is defined on the customer's agreement.

Note. A credit card link on support cases is enabled when the associated agreement line includes a price per transaction and does not entitle the customer to 100 percent coverage of time, material, and expenses. Also, many of the fields related to pricing do not appear if you selected *External - No Pricing* as the agreement category.

Purchase Option	Displays the method of purchasing the service or support offering for an agreement or agreement service transaction.
Prepaid Rate, Prepaid Unit, Baseline Price and **Baseline Price Unit**	Displays the amount paid per unit of work or per unit of time, depending on the purchase option of the agreement. Rates that are retrieved from an agreement service pricing record with a flat purchase option can be by the hour, case, or service order. Rates that are retrieved from an agreement service pricing record with a time and material purchase option can be per unit of time—hour, day, week, month, or year.
Transaction Purchase Option, Transaction Price Unit, Transaction Price, and **Currency Code**	Displays the transaction purchase option, the price per unit, the total transaction price and the currency. The currency that is displayed for the rate reflects the currency that is entered on the Billing page of this component.
Remaining Quantity	Displays the amount of the prepaid quantity that has not been used. For field service agreements, the prepaid quantity is in units of service orders or hours. For example, the CRM system reduces this quantity each time a user saves a new service order that is covered by the agreement line. If the service order is canceled, the CRM system readjusts the remaining quantity accordingly. For support agreements, the prepaid quantity is in units of cases or hours. Workflow processes must be implemented to update remaining quantity on support agreements.

Agreement Line: Line Details - Valid Sites

Use this section to add any valid sites to the agreement line. The system displays the site ID and description.

Note. Every line of a site-based agreement must be linked to at least one site.

Agreement Line : Line Details - Products Under Service

Use this section to add or delete any installed products that are covered by the agreement line. The system displays the description, serial number, asset tag (if there is one), quantity, and site where the product is installed.

Use the Add Installed Product and Delete Installed Selected Product buttons to make changes to the products listed under this group box.

Agreement Line: Line Details - Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component. You can add or delete entitlements in the grid by adding and deleting rows.

The system also displays the Holiday Schedule field after the entitlements. It appears by default from the Service Level page. You can override it or clear it. For Platinum customers, you may want inactivate the holiday schedule by clearing the field. If you enter a holiday schedule without a service level, the system treats it as a 7 x 24 entitlement with holiday schedule.

Entitlements Apply To

The system displays a group of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that appear.

For example, if you selected the *Match Using Case Criteria* option and selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields on this page.

If you do set values for the fields appearing in this group box, the system uses them to search for agreements when a user selects the Select Agreement link from the Case page.

For example, if you set the Priority field to *Low* on this page, the system would locate this agreement line and use the response and restore times that you set up on the agreement line for all low priority cases that meet the other criteria of the agreement line.

For all low priority cases that fulfill the other matching considerations for a valid agreement line for all low priority cases, the system uses other standard fields that are considered for an agreement match, such as start and end date, status, product, installed product, asset, and so on. The system is not using the other criteria in the Entitlements Apply To section.

Agreement Line: Line Details - Calculate Final Line Price

This section displays the variables that the CRM system used to calculate the final line price for the agreement line.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

Base Price	Displays the base price for the service or service product combinations of the agreement line.
	Note. For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price, is used to calculate the final line price.
Entitlement Adjustment	Displays the sum of the uplift and discount percentage values that are associated with the entitlements on this agreement line after clicking the Calculate Final Price button.
Subtotal	Displays the subtotal for the agreement line after the base price has been adjusted by the entitlement uplift or discount.
Adjustment (Percentage)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter a percentage by which you want to adjust the price of the agreement line.

Adjustment (Amount)   Select the positive (+) or the negative (–) sign from the drop-down list box and then enter an amount by which you want to adjust the price of the agreement line.

Reason   Select the reason that you are making the adjustment. If the reason is not listed in the drop-down list box, click the Other link and enter the reason you are making the adjustment.

Final Line Price   Displays the final price for the agreement line.

Sum of the Prepaid Quantity *x* Prepaid Rate

Calculate Final Price   Click this button to calculate the final price for the agreement line. The system retrieves all appropriate service or service/product prices, calculates subtotals and adds and subtracts any discounts or adjustments that you have made to the base price.

Agreement Line: Installed Products

The section lists all of the installed products covered by that agreement line. If the agreement covering the service order has a scope of *Site,* the installed products are limited to those that match the sites that are covered by the agreement line.

The CRM system displays the Products Under Service grid if you choose to view line details or just the installed product information of the agreement line.

It lists the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be added manually to the agreement.

When installed products are added to an agreement line, the CRM system automatically updates them on the agreement line whenever replacements are made at the customer's site (changes are recorded using the Manage Material component).

Before selecting an installed product, you must define a product for the agreement line; and, for agreements with a scope of *Site,* select the sites that will be covered by the line.

If the scope of the agreement is *Contact,* the installed product choices are limited to those that match the product and customer specified. You can never select installed products with a status of *Uninstalled.*

Agreement Line: Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line, including the holiday schedule. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component.

Agreement Line: Sites

The section lists all of the sites associated with the agreement line: the allowable values are determined by the sites that were entered on the Scope Details page. You can add or delete sites displayed in the grid by adding and deleting rows.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Agreement Line: Price Information

Use this group box to enter purchase option and transactional information for the agreement line. Click the Price Definitions link to access the Service Pricing page.

For more information and field descriptions, refer to the Line Details - Products section for the Agreement Line Tab.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Ordering and Receiving Materials"

Defining Billing Information

Access the Billing page.

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this page either.

Billing Details page

Customer Information

These fields capture information to determine how much to charge the customer for the agreement and the method of remittance that the customer uses.

Bill to Customer	Select the customer that should be billed for the service. The primary customer appears by default in this field.
Bill To Contact	Select the contact that should be billed for the service. The primary contact appears by default in this field.
Bill To Address	Select the bill to customer address to which the bill should be sent. The primary bill to address appears by default in this field.
Currency Code	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. The base currency of the sold to customer appears by default in this field.

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 payment terms 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.

Tax Parameters	Click this link to access the Tax Parameters page. Use this page to 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; however, you can override it by choosing another value.
Schedule	Select the schedule to indicate the way in which the revenue needs to be recognized in the general ledger. The system synchronizes this information from the general ledger.

Billing Information

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 use the new price in the totals until a user clicks the Recalculate Totals button. The system then calculates the sum of all active or closed 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 Line column to view all billable amounts that were included in the price for a given fee.
+/-	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter the number by which you want to adjust the price of the agreement line.
Adjustment	Enter the number, either a percentage or an amount, by which you want to make an adjustment.
Type	Select *Percent* or *Amount.*

Reason   Select the reason for the adjustment. These values are user-definable. You
                                  define reason codes on the Reason Code page (select Set Up CRM, Common
                                  Definitions, Codes and Autonumbering, Reason Codes). Use *Agreement
                                  Billing Adjustment, Case Billing Adjustment* or *Svc Order Billing Adjustment*
                                  as the reason type when you set up your reason codes.

                                  See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*,
                                  "Setting Up Call Center Prompt Tables," Setting Up Reason Codes.

Other   If the predefined values for the Reason field do not describe the reason for the
                                  adjustment, click this link to access the Other Reason page where you can
                                  enter a unique description of the reason.

Extended Price   This value is calculated when you click the Recalculate Totals button. The
                                  system sums the total of the price, plus or minus any adjustments.

Recalculate Totals   Click this button any time there is a change to the Billing Details grid that
                                  impacts the price or the currency code. The system recalculates the total
                                  cost of the fees.

Clear Adjustments   Click this button to clear the adjustments that were made and return to the
                                  original total amounts.

Defining Warranties

This section provides an overview of warranty definitions and discusses how to define warranties.

Understanding Warranty Definitions

Use the Warranty component to define the duration and entitlements that are associated with a warranty.
Defined warranties are associated with items on the Item Definition page.

For any item that is linked to a warranty, the CRM system automatically populates warranty information to all
installed products that are created for that item. However, you can manually update or delete the associated
warranty for an individual installed product.

For items that are installed at a customer's site, you can activate the warranty on a customer's installed
product by using the Installed Product component. When searching for entitlements for a product on a case
or service order, the CRM system checks the response time, so a warranty match may appear before or
after an agreement on the results page.

See Also

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

Page Used to Define Warranties

Page Name	Object Name	Navigation	Usage
Warranty	RF_WARRANTY	Customer Contracts CRM, Agreements, Warranties, Warranty	Define product warranties.

Defining Warranties

Access the Warranty page.

Warranty page (1 of 2)

Warranty page (2 of 2)

Warranty Details

Provider   Select the organization that absorbs the cost of the services that are covered by the warranty. Options include: *Manufacturer, Retailer,* or *Service Organization.*

Critical Times

This section details the periods of coverage for the warranty. If an installed product is under warranty, its default start date is determined by the ship date, installation date, or order date of the installed product, as applicable. The CRM system calculates the end date by adding the warranty length to the start date.

Warranty Length   Enter a number value to represent the length of the warranty.

Unit   Select the time unit of measure for the warranty period. The values are: *Day, Month, Week,* or *Year.*

Starts   Select when warranty coverage begins.

                            Install: Coverage begins the date when the item is installed at the customer site.

                            Order: Coverage begins the date when the item is ordered.

                            Ship: Coverage begins the date when the item is shipped to the customer.

Days for Refund, Days to Return, and **Days For Replacement**   Enter the number of days from the date in the Starts field during which the customer is entitled to return the item for a full refund, return the item to receive credit for the price of the item, or return the item in exchange for a replacement item.

Use the check boxes in the center of the page to indicate, for informational purposes, how warranty services are provided.

RMA Required (return material authorization required)   Select if installed products under warranty must be returned for warranty services by using RMA processing.

Walk-in Allowed   Select if the customer can bring installed products under warranty to your repair center.

Warranty Transferable   Select to keep the warranty in effect for the new owner if ownership of the installed product changes.

On-Site Repair   Select if installed products under warranty can be serviced at the customer's site.

Invoice Required   Select if the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed.

Shipment Allowed   Select if the customer can ship installed products under warranty to your repair center.

Loaner Provided   Select if the customer will be loaned a similar item while the installed product under warranty is being repaired.

Entitlement Plan Name   Select a default entitlement plan from the Entitlement Plan Name field to initially populate the grid with a predefined set of entitlements.

Entitlements

Use this section to add or delete entitlements from this set as necessary. Entitlement plans are established on the Entitlement Plan Setup page. You can also manually enter all entitlement entries into the Entitlements grid without entering an entitlement plan name to pre-populate the grid.

If you do not provide warranty service on holidays, select the holiday schedule that applies to your company's hours of operation. The system uses this information to calculate start and end dates for service.

Warning! If you change the entitlements that are offered by an existing warranty, you also change the entitlements for any installed product that is covered by the warranty. When a warranty has been associated with an installed product, you should not modify the warranty definition on the Warranty page. Instead, define a new warranty with the required entitlements and update the warranty information on the Item Definition page.

The CRM system displays the information that is associated with set of entitlements as defined on the Entitlements page.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Ordering and Receiving Materials," Managing Materials

Generating Sales Leads for Agreement Renewal

This section provides an overview of lead generation for agreement renewal and discusses how to set it up

Note. This feature is only available to customers have licensed PeopleSoft Sales and PeopleSoft Integrated FieldService.

Understanding Lead Generation for Agreement Renewal

To help you sustain company revenue and be proactive about contract renewals for the established customer base, set up PeopleSoft CRM to retrieve agreements that are expired or about to expire and generate sales leads for them. Like other leads, the leads that are created for agreement renewal appear on the Search Leads page for the sales team with *Agreement* as the lead source.

Lead Generation for Expiring and Expired Agreements

PeopleSoft CRM uses an Application Engine (AE) program, which runs on a daily basis (recommended setting) to look for agreements that are about to expire or have recently expired (based on the number of lead days that are defined by the user) and create leads for them.

When the AE program runs, it searches for agreements that are associated with the sales business unit that is specified on the run control page. Because sales leads are keyed by business unit and agreements are keyed by setID, the CRM system performs a business unit-setID mapping exercise in the background to determine which setID corresponds to the selected sales business unit. All agreements in that setID are processed, and all leads that are subsequently created will belong to the specified sales business unit.

Note. Only agreements with the status of *Available* are selected by the AE program for evaluation. The AE program does not process agreement templates.

Among all available agreements in the given setID, the AE program generates sales leads for those whose expiration date falls between the start and end dates of a time period that is calculated by using the user-defined lead time. The start and end dates are calculated using this formula:

(Start Date) = (Current Date) - (Agreement Renewal Lead Time)

(End Date) = (Current Date) + (Agreement Renewal Lead Time)

For example, the AE program is scheduled to run today on October 15, and the lead time (in number of days) that is defined at the installation level is 7. For any agreement with an expiration date between October 8 through October 22, a sales lead is generated by the lead generation process.

When you look up a sales lead for agreement renewal from the Search Leads page, agreement-specific information, such as agreement code and renewal number, is available on the Source tab as a reference. You can also transfer to the read-only version of the agreement from the lead.

For agreement renewal purposes, an agreement can only be associated with one sales lead at a time. The agreement is not selected by the AE program if a sales lead was already generated for it. In addition, the CRM system does not generate sales leads for agreements that are already renewed.

Setting Up Lead Generation for Agreement Renewal

This section discusses how to:

• Define lead time for generating leads.

• Generate leads for expiring agreements.

• Access leads that are generated for agreements.

Pages Used to Set Up Lead Generation for Agreement Renewal

Page Name	Object Name	Navigation	Usage
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Define how many days before or after an agreement expiration date that a sales lead should be generated.
Sales Lead Generation for Agreement Renewal	RUN_CNTL_RFLEAD	Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal	Start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired.
Lead - Discover	RSF_LEAD_ENTRY	Sales, Search Leads, Discover	Access sales leads that are generated for agreements.

Defining Lead Time for Generating Leads

Access the General Options page.

General Options page: General Options section

In the Agreement Renewal Lead Time field, enter the number of days before expiration that an agreement is eligible for the lead generation process. This is also the number of days after expiration that the agreement is still eligible for the process. By default, this value is set to *90* days.

See Chapter 3, "Setting Up General Options," page 19.

Generating Leads for Expiring Agreements

Access the Sales Lead Generation for Agreement Renewal page.

Sales Lead Generation for Agreement Renewal page

Select a sales business unit for which leads will be created for expiring agreements after the AE program (RF_AGR_LEAD) is run.

Note. The AE process should be run on a daily basis.

Accessing Leads That Are Generated for Agreements

Access the Lead - Discover page.

Lead - Discover page (1 of 2)

Lead Details

*Description	Renewal of agreement COM-AGR-102	Business Unit	US200		🔍
Sales Rep	Ralphs,Sandy Mountain 🔍	Revenue		Currency	USD 🔍
*Status	Open ▼	Rating	▼	Priority	5 ▼

Contacts

No contacts have been selected. Press Add button to view all contacts for this customer.

First Name [   ]   **Last Name** [   ]   Add

Accept/Reject Lead

[Accept]   [Reject]   [Turnback]

Related Transactions

👥 Assign Team | 📦 Add Product | 📝 Create Quote| 📋 Add Task | ⌨ Add Note

Lead - Discover page (2 of 2)

Open a sales lead that is generated for agreement renewal purposes. You can click the Agreement link to access the agreement that needs to be renewed. The name of the agreement is listed is part of the lead name.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Creating Sales Leads and Opportunities"

CHAPTER 26

Defining Pricing Information for Services and Support Offerings

This chapter provides an overview of pricing records and discusses how to establish pricing records.

Establishing Pricing Records

This section provides an overview on pricing records and discusses how to establish pricing records.

Understanding Pricing Records

This section discusses:

- Pricing records.
- Types of pricing records.
- Products, services, and service activities on pricing records.
- Pricing records for each currency.
- Purchase options.
- Pricing structures on agreements.

Pricing Records

You use the Pricing Information component in PeopleSoft CRM to define pricing records for service and support offerings. The system uses the pricing structure that you define to calculate prices on agreements.

When you are creating service orders and cases, you can use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support calls, or an additional service activity that is not included in the service on the customer's agreement. The system, however, automatically populates the price defined on the Pricing page for the transaction.

Note. With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. It can also price on-demand transactions for cases and service orders as well as service fees.

Types of Pricing Records

You can define pricing records for these types of transactions:

- Agreements
- Agreement services

- Agreement cases

- On-demand services

- On demand cases

Agreement pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. In addition, PeopleSoft CRM supports the ability to pay for the agreement on a recurring basis.

Agreement service or case pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed.

On-demand pricing records define the amount that a customer pays for services or support offerings that are not covered by an agreement. Typically, on-demand prices are higher than agreement services prices. By purchasing an agreement, the customer may receive a discount on the normal price of a service or support offering.

Products, Services, and Service Activities on Pricing Records

The prices that you define for agreements, agreement services, agreement cases, on demand case and on-demand service pricing records can define rates for a service, a product, or both a service and a product. Pricing records that only specify products are used by call centers to define rates for supporting specific products and are identified as agreement case or an on-demand case. Field service organizations define pricing records for a service or for a combination of a service and a product and are identified as agreement service or on-demand service.

When calculating pricing on an agreement, the system checks first for a price for the service-product combination. If none is defined, the system uses the price that is defined for the service alone. For support-based agreements, the agreement price is based on prices defined for products only.

You can also define rates for service activities and combinations of products and service activities. These pricing records enable you to adjust a customer's invoice when he or she requests additional service activities that are not included in the service.

For example, at the time that a customer requests a service that is covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service that is covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that you can define a pricing record for a service or a service activity, but not both.

Pricing Records for Each Currency

Every pricing record defines a rate in a specific currency. You must define a complete set of pricing records for each currency that is valid for agreement, agreement service, agreement case, on demand case and on-demand service transactions in your business. When you create an agreement, you can reference the pricing records for only one currency.

Purchase Options

You can define prices for these types of purchase options:

- Flat

- Prepaid

- Time and material

A flat purchase option specifies a set price for a service or support offering on an agreement, an agreement service, or an on-demand service pricing record. A flat rate for an agreement is expressed in a time-based unit of measure, such as hours, days, weeks, months, or years.

For an agreement service, on-demand service, agreement case, or on-demand case, flat rates are expressed in units of work, such as per case or per service order. The flat rate is expressed as an amount to be paid for each installed product that is covered by that service. For example, if a flat rate is defined as 100 USD per year for a service, and the agreement line that references that service has two installed products, the line price would be calculated as 200 USD for one year.

With the prepaid purchase option, customers pay for a specified quantity of a service or support offering at the time that they purchase the agreement. The prepaid purchase option applies only to agreement pricing records. You define a price for a set quantity of cases or service orders, or a price for a certain number of hours worth of work.

You may define different prices for the same service or service-product combination for different prepaid quantities; for example, 100 USD per service order when prepaying 20 service orders, and 90 USD per service order when prepaying 50 service orders. The prepaid quantity of cases or service orders is saved on the agreement, and the value is decreased when a case or service order is created to account for the consumption.

If the case or service order is subsequently canceled, the quantity is added back to the agreement. If the prepaid quantity is in units of hours, the system decreases this quantity each time a technician or agent uses the Manage Time component to report time that is spent (total hours) on a service order or case that is covered by the agreement line.

The time and material purchase option defines a rate for the labor time that is required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement and on-demand service and case pricing records. Material is not directly accounted for by the time and material purchase option. However, you can track material usage for service orders and manually account for the material when creating the customer's invoice.

This table summarizes the valid data combinations on a pricing record and provides an example for each combination:

Applies To	Purchase Option	Unit	Prepaid Quantity	Example
Agreement	Flat	Time-based (hour, day, week, month, year).	Not allowed	200 USD per year.
Agreement	Prepaid	Case, service order, or hour.	Required	30 USD per service order for a prepaid quantity of 15.
Agreement service/case	Time and material	Time-based (hour, day, week, month, year).	Not allowed	40 USD per hour.
Agreement service/case	Flat	Case or service order.	Not allowed	45 USD per service order/case.

Applies To	Purchase Option	Unit	Prepaid Quantity	Example
On-demand service/case	Flat	Case or Service order.	Not allowed	55 USD per service order/case.
On-demand service/case	Time and material	Time-based (hour, day, week, month, year). For cases it's only hour.	Not allowed	75 USD per hour.

Pricing Structures on Agreements

On agreements, you can set up pricing structures that use various combinations of pricing records.

For example, your business might offer a five-year preventive maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform preventive maintenance tasks on a customer's air conditioner for five years.

For customers who buy this agreement, you also offer repair services for 75 USD per service call—a 50 percent discount off your on-demand rate. To support this agreement scenario, you define an agreement pricing record with a flat purchase option for preventive maintenance service of 100 USD per year. You also define an agreement service pricing record for your air conditioner repair service for a flat rate of 75 USD per service order. Your on-demand pricing record for the same service would be 150 USD.

After defining your pricing records, you create an agreement with a five-year duration that references the agreement and the agreement service pricing records. The customer who buys the agreement pays 500 USD and receives preventive maintenance service for five years. If the customer's air conditioner requires repair services, the customer pays 75 USD per repair service order for the duration of the five-year agreement.

Note. Prepaid quantity is a fixed amount per contract, not per year. In this case, if someone were to prepay for 10 PM visits (regardless of agreement duration), you can define a prepaid price of 50 USD per service order for a quantity of 10 service orders. An alternate arrangement would be to define a flat rate of 100 USD per year for unlimited PM service. For a five-year agreement, this would cost 500 USD for unlimited PM service.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 375

Page Used to Establish Pricing Records

Page Name	Object Name	Navigation	Usage
Service Pricing	RF_SVC_PRICE	Pricing Configuration, Service Pricing, Service Pricing	Establish pricing records for service and support offerings.

Establishing Pricing Records

To establish pricing records, use the Service Pricing (RF_SVC_PRICE) component.

Access the Service Pricing page.

Pricing Information page

Note. To establish pricing for products that you sell, use the Price page under Products CRM. Also, material costs for items are stored in the inventory system.

Search Filter

Select pricing information that meets a specific set of criteria. Enter the criteria and click the Search button. If you click the Search button without specifying any criteria, the system returns all pricing records that are defined for the setID.

Service	Select a service to limit the search to pricing records that are defined for a specific service. You define services by using the Services component. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.
Activity	Select a value to limit the search to pricing information that is defined for a specific service activity. You use the Service Activity Code page to define activities. Click the Transfer to Activity button to access the Service Activity Code page.
	Note. Search criteria can include a service or an activity, but not both. These fields are mutually exclusive on the pricing record.
Purchase Option	Select a value to limit the search to pricing records for the specific purchase option:*Flat, Prepaid,* or *T&M* (time and material).
Product ID	Select a value to limit the search to pricing records for specific product. You establish products in PeopleSoft CRM by using the Product EIP or the Product Definition component.

Applies To	Select a value to limit the search to pricing records for the specific applies to option: *Agreement, Agreement Case, Agreement Service,On Demand Case,* or *On Demand Service.*
Currency Code	Select a value to limit the search to pricing records for a specific currency. You establish currencies on the Currency Code page.

Prices

The system displays the pricing information records that meet the search criteria.

Applies to Information

Applies To	Select the transaction that the pricing record applies to: *Agreement, Agreement Case, Agreement Service,On Demand Case,* or *On Demand Service.*
Purchase Option	Select the purchase method for the service or support offering: *Flat, Prepaid,* or *T&M* (time and material).
	The *Prepaid* option applies only to pricing records for agreement transactions.
	The *T&M* option applies only to pricing records for agreement service, agreement case, on demand case and on demand service transactions.
Service	Select the service that the pricing applies to, if applicable. You use the Services component to define services. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.
Product ID	Select the product that the pricing record applies to, if applicable. Click the Transfer to Product button to access the Products component.
	If you specify both a product and a service on a pricing record, the price applies only to that particular service-product combination. Pricing records that only specify products are used only by call centers to define rates for supporting specific products.
Activity Code	Select the service activity that the purchase option applies to. You can define pricing records for service activities or combinations of service activities and products. You can define a pricing record for a service or an activity, but not both.
	You can use service activity price information to adjust a customer's invoice when activities are added to a service that is covered by an agreement. The system displays the information on the Billing page for the service order or case.

Rate Information

Currency Code	Select the currency of the rate amount. You must define a complete set of pricing records for service and support offerings for each currency that you use.
Rate Amount	Enter the amount that is charged per the specified unit in the specified currency.
Unit	Select the unit of work that is associated with the rate amount. Depending on your Applies To and Purchase Option field selections, you can specify a rate for the following work units: *Day, Hour, Month, S.O.* (service order), *Case, Week,* or *Year.*

Prepaid Quantity	Enter the number of work units of a service or support offering that a customer pays for in advance. This value applies only to the *Prepaid* purchase option.

See Also

Chapter 26, "Defining Pricing Information for Services and Support Offerings," Understanding Pricing Records, page 431

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

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 375

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Setting Up Services"

PeopleSoft Inventory 8.9 PeopleBook

CHAPTER 27

Performing Entitlement Searches for Cases and Service Orders

This chapter provides an overview of entitlement searches and discusses how to perform searches.

Understanding Entitlement Searches

This section discusses:

- Entitlement searches.
- Minimum information that is required to perform entitlement searches.
- Warranty matches.
- Agreement matches.
- Service level suspensions for PeopleSoft HelpDesk.
- Delay Notifications.
- Workflow.

Entitlement Searches

Entitlements define what a customer is contractually owed for the service or support offering on an agreement line or warranty. When you perform an entitlement search on the Service Order page or Case page, the system searches for valid agreement lines or warranties that cover the work on the service order or case and displays the associated entitlements.

The system uses the values that you entered in the fields for product ID, serial number, service, and either site or site identification number (SIN) to search for agreement line and warranty matches for service orders. For cases, the system uses the same fields (with the exception of service) as well as those for contact or personal identification number (PIN).

For support cases, the system passes customer, contact, product ID, serial number, case ID, PIN, SIN, and site as the search criteria for entitlement searches.

For help desk cases, the system passes employee, case ID, product, asset tag, priority, source, department, location, employee role (defined as manager level in the Worker component), and person type (employee, contingent worker, or person of interest) to the search. Additionally, for employees and contingent workers, the employee status is passed to the search.

Note. If the internal agreement search option is set to *Match Using Case Criteria,* the system additionally passes priority, source, department, location and employee role information to PeopleSoft HelpDesk searches, depending on the values that are set on the Agreement Search Configuration page. Likewise, if the external case agreement search option is set to *Match Using Case Criteria,* the system additionally passes case category, priority, source, type, and customer value information to PeopleSoft Support entitlement searches, depending on the values that are set on the Agreement Search Configuration page.

If the system renders more than one warranty or agreement line that match the available search criteria, you can select the appropriate one from the entitlement match list that is generated by the system. When you make a selection, or if the CRM system finds only one match, the entitlement information of the selected agreement line or warranty is automatically populated to the service order or case. You can view the entitlement details directly on the service order or case.

Minimum Information That Is Required to Perform Entitlement Searches

Before you perform an entitlement search, you must provide a customer or employee that is associated with a case or service order. Additionally, the case search uses the case ID plus one of the following: contact, PIN, site, or SIN. The product ID and serial number or asset tag number are optional but are recommended because they focus the search to a much greater degree.

For entitlement searches on service orders, you need to provide a site ID or SIN in addition to the customer. You can further limit the search by entering a product ID (or the installed product ID, which is identified by the serial ID on the service order), or a service.

When entering information on the case or service order, the system uses the product ID that you enter to select the appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product (which is displayed in the Serial ID field), all the matching entitlements are returned.

Warranty Matches

If you enter an installed product on the service order or support case, the system checks for a valid warranty that applies to the installed product. The system identifies the installed product by using the serial number that appears on the case or service order.

When an installed product is specified on the service order or support case, the system checks for the following conditions:

• The installed product is associated with a warranty.

• The current date is equal to or later than the warranty start date.

• The current date is equal to or prior to the warranty end date.

• The status of the warranty is *Active.*

If all conditions are met, the system returns the warranty as a match. The system does not return, and you cannot select, warranties from searches for a PeopleSoft HelpDesk case.

Agreement Matches

The CRM system searches for agreement line matches in addition to any warranty matches that are found. For an agreement line to be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement line, the agreement line must have a status of *Active,* and the agreement itself must have a status of *Active.*

The customer who is listed on the service order or support case must match the customer who is identified on the agreement.

The internal PeopleSoft HelpDesk agreement always applies to all employees, except when the user has selected *Match Using Case Criteria* on the Agreement Search Configuration page for internal agreements and has applied the various rules to individual agreement lines to limit the applicability of those lines to certain groups of employees based on role or department. The administrative contact on the header page for the internal agreement is NOT the worker for whom the agreement applies.

If a SIN is entered, the CRM system returns all agreement lines whose site matches the site linked to that SIN on agreements with a scope of *Site.* If a site ID but not a SIN is provided, the system returns all agreement lines that match the site ID.

Note. On a case in which a site ID was previously selected, the CRM system limits the selection of installed products to those that are specified for that site. On a service order in which a site ID was previously selected, the system limits the selection of products and installed products to those that are available to the selected site only.

If you enter a PIN, the system returns all agreement lines whose contact (named caller) matches the PIN on agreements with a scope of *Contact.* If a contact but not a PIN is provided, the system returns all agreement lines where the contact is listed as the named caller.

Note that field service agreements only use authentication by site or SIN (not by named callers). Therefore, no PIN field exists on the service order, and the contact's person ID is not matched against PIN entries in agreements.

If an installed product is identified on the case or service order, the system returns all agreement lines that list the installed product as a product under service. Agreement lines that cover the corresponding product ID and do not list individual installed products (for example, agreement lines that provide blanket coverage) are also returned.

Note. The Agreement Search Configuration page enables you to choose the rules on how you want the system to return lines for agreement searches. For PeopleSoft Support, Integrated FieldService, and HelpDesk you can enable the system to search for agreements based on the shortest or longest response times; or let the user select from all matches. Additionally, for PeopleSoft HelpDesk and Support, you can set up specific rules by which the system will search for agreements by matching on additional criteria.

Service Level Suspensions for PeopleSoft HelpDesk

When a service level agreement (SLA) cannot be met for justifiable reasons, an agent using PeopleSoft HelpDesk can change a case to the *On Hold* status. In this situation the system sends a suspension notification to the agent's manager. This also applies to PeopleSoft Support.

The system stops the clock for the service agreement and clears the response and restore dates and times. When the case is activated again, the agent or manager changes the case status back to *Open.* When this happens the clock resumes from where it left off and the response and restore dates and times are recalculated to reflect the on hold period.

To facilitate these processes, PeopleSoft delivers these notifications and workflow exceptions:

Delay Notifications

When the agreement is applied, the system sends out a delayed notification to remind the agent, provider group, or call center manager of a potential SLA delay. PeopleSoft delivers these notifications as sample data:

• Response

- Based on delayed percentage configured through AAF, the system sends a notification to the agent regarding initial response if it's not met yet. If no agent is assigned to the case, the system sends notification to the provider group. If no provider group is defined on case either, the system send notification to the call center manager.

- When the delay reaches 100 percent of the response time, the system sends a notification to the agent and manager regarding the response exception and sets the service agreement response met flag to *No.*

• Restore

- Based on delayed percentage configured through AAF, the system sends a notification to the agent warning of potential service agreement exceptions (the same change as response.)

- When the delay reaches 100 percent of the restore time, the system sends a notification to the agent and manager regarding the restore exception and sets the service agreement restore met flag to *No.*

Workflow

This is general workflow delivered for SLA, not workflow exceptions. The CRM system delivers these workflows as system data:

• SLA Start

When a case is associated with a service agreement or warranty, the system triggers an SLA start event to create an event history entry with an agreement code or warranty name.

• Delayed Notification

When service starts, the system schedules delayed notifications. The system sends an initial notification to the agent, provider group, or call center manager regarding call back or warning of potential exceptions. When you first install your CRM application, PeopleSoft delivers 90% delayed notification. The system sends out a notification when the case is not responded to and is past 90% of the customer's entitled response. You can, however, percentage easily configure this percentage in AAF.

• SLA Response Met

When a case is responded to within the entitled response time, the system triggers an SLA Response Met event and creates an event history record.

• SLA Restore Met

When a case is closed within the entitled restore time, the system triggers an SLA Restore Met event and creates an event history record.

• SLA Response Exception (Application Engine process)

This workflow exception is scheduled as a delayed Application Engine process when service starts. When the service response is not met, the system wakes up the Application Engine program. The program calls the component interface (CI) to set the response met flag to *No,* and then triggers the SLA Response Exception workflow.

• SLA Response Exception (workflow)

When the response met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

• SLA Restore Exception (Application Engine process)

This workflow exception is scheduled as a delayed Application Engine process when service starts. When a case is still open at the time restore is reached, the system wakes up the Application Engine program. The program calls the CI to set the restore met flag to *No,* and then triggers the SLA Restore Exception workflow.

• SLA Restore Exception (workflow)

When the restore met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

• SLA Change

Users with the change privilege can open the case, clear the service agreement, change the search criteria (changing priority or source is mainly for PeopleSoft HelpDesk users). For PeopleSoft Support and helpdesk, users with privilege can clear the SLA, change other items, and reattach the SLA. Additionally, they can attach another service agreement based on the new criteria. This workflow event triggers the SLA Change workflow to create an event history entry indicating a new service agreement code. As such, a new service agreement cycle starts. The system also cancels any outstanding service agreement exception workflows and triggers the rescheduling of the service exception. The user can detach the SLA in the SLA section for a case. PeopleSoft delivers sample data so that only call center managers and help desk managers can detach an SLA.

• SLA Suspension

When an agent changes a case status to *On Hold,* the system triggers an SLA Suspension event. The system sends a notification to the manager. It also cancels any outstanding delayed notifications and service exception workflows.

• SLA Resume

When a manager declines the service agreement suspension or the case is ready to be worked on again, the manager or agent changes the case status from *On Hold* to an *Open* status. The system triggers an SLA Resume event to reschedule service exception workflows.

When a case is not assigned to any agent, a notification is sent to the provider group on the case. If there is no provider group, a default provider group on the Business Unit Setup page is used for notification.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," Configuring the CRM System for Agreement Searches, page 390

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 375

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Managing Cases"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Creating and Managing Service Orders"

Performing Entitlement Searches

This section discusses how to search for and view agreements and warranties

Pages Used to Perform Entitlement Searches

Page Name	Object Name	Navigation	Usage
Entitlement Match	RF_ENTL_LIST_SEC	• From the Case or Service Order page, click the Select Agreement or Warranty link. • For PeopleSoft HelpDesk cases, select the Select Agreement link from the Case page.	View and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case. This page appears only if multiple agreement lines or warranties meet the entitlement search criteria.

Searching for and Viewing Warranties and Agreements

Access the Entitlement Match page.

Entitlement Match page

The system displays agreements and warranties that meet the entitlement search criteria that is entered for the service order or case. Select the appropriate agreement line or warranty for the case or service order. The system displays the details for the agreement line or warranty in the Details group box. You can only select one agreement line or warranty.

Note. If you have not saved the service order, you can perform another entitlement search and select a different warranty or agreement line by clicking the Edit button on the Service Order page.

For cases, agents can attach an agreement, but only the manager can detach it once it saved. When an agent selects an agreement on a case, he or she can still perform another search by clicking the Clear link and selecting a different agreement before saving the case.

Once the case is saved, only the manager has the privilege to change the agreement. This is controlled through the rule-based security that is defined in the Display Template Component pages for the Clear field. PeopleSoft delivers help desk manager and call center manager as sample data and provides these user IDs with the ability to detach agreements.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Select One Line for Entitlements

Name and **Type**	Displays the name (agreement or warranty) of the entitlement match. Click the adjacent Agreement or Warranty Transfer button to access the corresponding Agreement or Warranty component.
Renewal Number	Displays the renewal number for the agreement. There are no renewals for warranties.
Line	Displays the agreement line number that specifies entitlements for the combination of relevant criteria that has been entered on the case or service order.

Note. As described earlier in this chapter, the criteria used for identifying agreement lines may include more than just the customer, site, and product ID.

Description	Describes the agreement or warranty as it was entered into the system.
Service	Describes the service that is associated with the agreement or warranty. Click the Transfer to Service button to access the Service page and view details of the service as it was entered into the system. The system displays this field for PeopleSoft Integrated FieldService only.

Entitlement Details

Lists the entitlements that define the response time, restore time, service level, or coverage that are contractually owed to the customer as defined by the agreement line or the warranty.

Product Information

Product ID and **Product Description**	Displays the ID and description of the product
Currency	Displays the currency of the transaction price. The system does not display this field for PeopleSoft HelpDesk.
Transaction Price	Displays the price of the transaction for receiving support or the specified service for the product (repair, preventive maintenance, and so on). The system does not display this field for PeopleSoft HelpDesk.

Purchase Option   Displays the method of purchasing the service or support offering for an agreement or agreement service transaction. The system does not display this field for PeopleSoft HelpDesk.

Options are:

Flat: The service or support offering is purchased for a flat fee.

Prepaid: A specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is remaining quantity for the agreement line.

T&M (time and material): The price of the service or support offering per transaction is based on the labor rate.

Remaining Quantity   Displays the amount of unused, prepaid quantity. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours, and the system decreases this quantity by 1 service order or the appropriate number of hours specified in the timelog as billable each time a service order that is covered by the agreement line is saved.

If the service order is canceled, the system increases the appropriate number of hours or remaining quantity by 1. For support agreements, workflow processes must be implemented to update remaining quantity. Lines with zero remaining prepaid quantities are not shown.

Note. The system makes any agreement line available for selection that has more than one product for which there are some products with a zero prepaid balance and some products that have a positive prepaid balance or do not use the prepaid purchase option. If the user selects that line, the system makes the corresponding detail section with the product lines that have zero prepaid balances unavailable for selection.

See Also

PART 8

SmartViews

Chapter 28
Setting Up SmartViews

Chapter 29
Working with SmartViews

CHAPTER 28

Setting Up SmartViews

This chapter provides an overview of SmartViews and discusses how to set them up to work in PeopleSoft CRM.

Understanding SmartViews

This section discusses:

- SmartViews framework overview.
- Use of templates.
- Metrics and terms.
- Data storage.
- Audiences and segment groups.
- SmartViews security.

SmartViews Framework Overview

The SmartViews framework enables you to effectively manage key customer groups in a centralized environment where current customer performance information is shared among authorized users. Use this framework to create a configurable, customer-centric view of the enterprise. Through SmartView templates, you can set metrics to view customer performance or measure it in respect to target values. SmartView users can personalize metrics to view meaningful data about customer segments down to the individual account level. They can also perform predefined actions on customers, such as creating a campaign, a plan, or sending correspondence to communicate the SmartViews with interested parties across the company.

The customer-centric view of the enterprise is a SmartView. It is constructed using two elements:

- Templates

  A template dictates what data users are able to see in SmartViews.

- Customers

  Customers are grouped as audiences or segment groups. The SmartViews displays data that pertains to the selected audience or segment group.

This diagram illustrates the high-level process of setting up templates and customers and using these components in SmartViews:
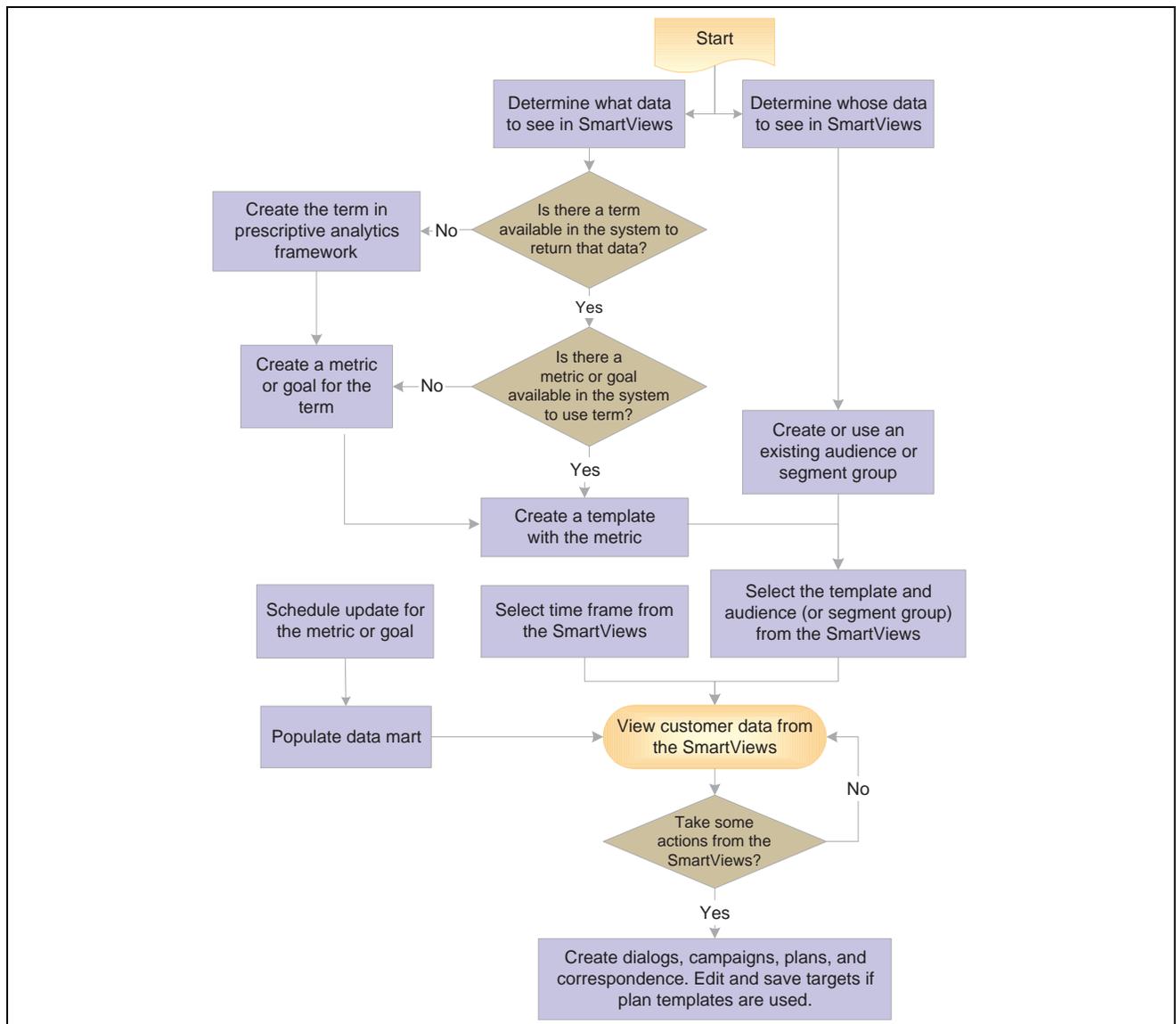
Process flow for setting up and using SmartViews

Use of Templates

A template determines which data you see in the SmartViews for each selected audience or segment group (collectively) and customers that belong to it (individually). SmartViews operates in these modes:

• *Plan mode* if Strategic Account Planning is licensed.

• *Metric mode* is supported whether or not Strategic Account Planning is licensed.

When creating a template, you reference one or multiple relevant goals or metrics. Each of them is regularly resolved into customer-specific data through a batch process and is displayed on the My SmartViews page at runtime. From there, users can view meaningful information about customer segments or audiences and each of their individual accounts. Goals and metrics are functionally similar, except that goals support target values as well. Users can edit target values directly on the My SmartViews page and view the variance between target and actual values.

If PeopleSoft Marketing is licensed, SmartViews support the use of audiences and segment groups (segments) in the plan and metric modes; otherwise, only audiences are supported. In this case, you would create audiences from the save search feature (for Lead, Opportunity, Person, and Company) because the Manage Audiences component is not available (part of the marketing application).

Plan Mode

Users can leverage planning templates and goals that are defined for Strategic Account Planning and use them in SmartViews. In the plan mode, users can select segment/audience or account planning templates for the segment group or audience they are viewing. They can modify target values of goals in the SmartViews directly and save the updates in respective plans.

SmartViews can validate a goal target if the goal can be aggregated. When segment/audience type templates are used, users can validate the aggregated target values of the child level against the total value at the audience or segment level. Note that the target value of the audience or the highest-level segment doesn't always equal the sum of its child accounts or segments. This happens typically when users manually update target values and, over time, the numbers don't match.

The system displays a message for each goal that it validates; if the message shows a discrepancy between the total number at the parent level and the sum of target values at its child level, users can modify them accordingly.

Note. No data is displayed in the SmartViews if you choose to view a segment group with an account planning template, because account templates apply to accounts only.

In the plan mode, the SmartViews displays target values for accounts, audiences, or segments if they belong to plans that are based on the selected template with the same time frame. If values cannot be returned for some reason (for example, there's no plan associated with a particular account or the time periods don't match), the system provides explanatory messages on the SmartViews.

Metric Mode

SmartViews work like a reporting tool in the metric mode. In this mode, you define metrics (measurements of key performance) and associate them in SmartView templates that you create to monitor customer performance. The metric mode is available whether or not Strategic Account Planning is licensed.

Note. Planning templates and goals are not available when Strategic Account Planning is not licensed.

When SmartViews are displayed in metric mode, users can see the actual metric values for each segment or account of the selected segment group or audience. Unlike in plan mode, where the status, target values, and variance values can be available if so configured, users don't see this information in the metric mode (with the exception of history variance).

See Also

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, "Creating Segment and Audience Plans"

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, "Setting Up PeopleSoft Strategic Account Planning"

Metrics and Terms

A metric is a measurement of key performance; for example, lead count, number of products owned, or number of cases. In the definition of a metric (or goal), you specify a term that represents it. The idea of a term comes from the Active Analytics Framework; it's metadata with a user-friendly name and it refers to a piece of information that could either exist physically anywhere in the system or could be derived. It is stored in the data library, which is part of the active analytics framework.

SmartViews run a scheduled batch process to retrieve metric or goal values. This process resolves terms (referenced in metrics or goals) into data that pertains to each account or segment that is displayed on the SmartViews. Users can control which goal or metric and what type of values (for example, actual, history, and target values) to see through the user's personalization.

SmartViews deliver terms for data related to sales, marketing, partners, and wealth management; leverage them when you create new goals and metrics. For a list of terms that are delivered by SmartViews, navigate to Enterprise Components, Active Analytics Framework, Data Library, Manage Terms and search with the context name of Portfolio Segment.

Terms are organized in a tree structure called the subject area. When administrators define metrics and specify SmartViews-specific terms, those terms are available under the SmartViews folder of the Term Selection page.

Take advantage of goals if you license Strategic Account Planning. Goals, if defined to support both planning and SmartViews usage, can be used as metrics in SmartView templates. The difference between using goals in planning templates and SmartView templates is that the setup on target values and assessment in goals doesn't apply to SmartView templates. Therefore, SmartViews don't show target data when users select a SmartView template.

See Also

Chapter 28, "Setting Up SmartViews," Defining Metrics, page 458

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

Term Creation: Considerations

For a term to function properly in the SmartViews context, it must have an implementation that is defined for the following context:

• Account Plan - Returns information for a given person. It calculates the information based on the following parameters:

  - BO_ID and ROLE_TYPE_ID - these two parameters define for whom the calculation is intended.

  - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.

  - CURRENCY_CD - this parameter is used by terms of which the return data is currency-based; thus the currency in which the data should be returned.

• Audience/Segment Plan - Returns the information for a given audience or segment. It calculates the information based on the following parameters:

  - SETID and RA_LIST_ID - these two parameters define the audience or segment for which the term should be calculated.

- SEG_START_DATE - this date defines which segment composition should be used based on the given date.

- START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.

- CURRENCY_CD - this parameter is used by terms of which the returned data that is currency-based, thus the currency in which the data should be returned.

• Segment Group - Returns the information for a given segment group. It calculates the information based on the following parameters:

- SETID and RA_SEGMENT_GRP_ID - these two parameters define the segment group for which the term should be calculated.

- SEG_START_DATE - this date defines which segment composition should be used based on the given date.

- START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.

- CURRENCY_CD - this parameter is used by terms to return data that is currency-based.

• Portfolio Segment - Used by the Datamart. It calculates all the BO_ID objects for all the currently defined periods based on all the SmartViews and templates selected by the users.

- SETID and RSP_GOAL_ID - these two parameters define which goal should be calculated.

- CURRENCY_CD - this parameter is used by terms to return data that is currency-based.

If there are conditions that the term cannot handle, the system can create an exception and pass it to the calling program; for example:

```
throw CreateException(18149, n, "NMG:  Data doesn't exist for this role type.");
```

where *n* is a number greater than 200. Define a message number in message set 18149 with *n* greater than 200.

Data Storage

SmartViews caches data to facilitate page rendering when the SmartViews is first loaded or subsequently updated. The system provides an application engine (AE) program called RPM_DATAMART that is responsible for retrieving and computing specified goal or metric data and storing it in a predefined data mart.

You can define batch processes to run the AE program on a regular basis; for example, nightly, or every few hours. The system retrieves data from the data mart when metric templates are used. When planning templates are used, data comes from Strategic Account Planning directly.

Among the enabled goals or metrics, the AE program updates those that are included in any template that has been selected by users on the Configure My SmartViews Profile page to view SmartViews, for the specified time period. Each one of them is updated for every member that belongs to the selected audience or segment group as well as the audience or segment groups themselves as a whole.

For example, if there's one selected audience on the Configure My SmartViews Profile page and it has three accounts associated with it, the AE program returns a total of four metric or goal values.

Users can get realtime goal or metric data anytime they're reviewing the SmartViews, if so configured. This functionality applies to actual data for goals whose calculation method is set to *automatic*.

See Also

Audiences and Segment Groups

Audiences and segment groups are the two forms of customer groupings that can be referenced on the SmartViews.

Audience

An audience is a logical grouping of customers (accounts) that can consist of contacts for companies or partners, and consumers. Customers in an audience may originate from multiple setIDs depending on how you set up the selection criteria. There are a few ways to create audiences; you can use the audience builder in the Manage Audience component of PeopleSoft Marketing, or configurable search pages of components that enable the creation of audiences, such as Lead, Opportunity, Person and Company. In SmartViews, an audience is represented by consumers and companies or partners to which its contacts belongs.

Compared to the Manage Audience component that bases its audience count on the number of consumers and contacts, the audience count that is displayed in the SmartViews is always equal or fewer because a company or partner often has multiple contacts.

SmartViews display only generated and published audiences. For audiences to be used in SmartViews, they have to meet these conditions before the generation process occurs:

• Must be at the status of *Approved* or *Committed.*

• The Published check box is selected.

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

Segments

A segment is a type of audience, a group of customers as defined by selection criteria. Every segment is associated with a segment group, which represents a multiple-level hierarchy that contains segments, each of which can have its own child segments.

You can define parent-child relationships between segments by referencing the parent segment in the child segment's definition, and each segment is associated with the segment group of its parent. The structure of the lowest level segments is the same as audience, which consists of customers of the same or different roles.

A segment consists of a group of company or partner contacts, or consumers. In most cases, they will be subcategorized and be available among its child segments (if any). In SmartViews and Strategic Account Planning, the customer counts at non-leaf segments are aggregated and become the total count of leaf segments.

Similar to audience, the count that is displayed in segments (in the Segment component) may not match the count that is displayed on SmartViews because the former count is for contacts and the latter is for companies and partners. In the Segment component, if a segment has customers at the parent level and they do not belong to any child segment, they are not included in Strategic Account Planning and SmartViews.

Segments and segment groups are available if you license PeopleSoft Marketing.

For segments to be displayed in the SmartViews as part of their segment group, they need to be generated and published. The same is true with audiences. Segments should be in either the *Approved* or *Committed* status and have the Published check box selected before the generation process starts.

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

Plan Creation in Audiences and Segments

Users can create plans for audiences or segments that are already published on the Plans page of the Manage Audience component, if they are given the proper permission to the plan component. The Plans page doesn't appear if the corresponding audience or segment is not published.

From the My SmartViews page, users can create plans for the audience or segment group that they are looking at. The plan creation action is available once the system verifies that the sign-in user has access to the component. Based on the type of template that is selected, users can choose to create account plans (for *account* templates) or account and audience plans (for *segment/audience* templates). To ensure that users have access to the plans they create, the appropriate dataset rules must be present to grant them the permission. For example, set up a dataset rule that allows access to plans that are created by the sign-on user.

See Chapter 29, "Working with SmartViews," Working with SmartViews, page 465.

SmartViews Security

Data access in the SmartViews is restricted to authorized users as it often contains sensitive information. When the SmartViews is in the metric mode, users can see customer data for an audience or segment (within the segment group) only if they are a team member of the corresponding audience or segment. If the SmartViews is in plan mode, they need to be a plan team member of the selected template to see the data. The SmartViews displays a padlock icon next to the audience or segment that users cannot access. The icon indicates that it cannot be viewed.

Security for Historical Data

You can set up SmartViews to display data from past time periods and for comparison with current data. Users personalize how they want historical customer data to appear by selecting the frequency (for example, annually and quarterly) and the number of times to retrieve the data for the selected frequency (for example, two previous quarters).

Historical data is only available for time frames that are defined in the system. To view past data of an audience or segment, users need to be a current team member of the audience or segment when in metric mode. If users are viewing the SmartViews using a plan template (that is, in plan mode), users need to be a current team member of that plan *and* the audience or segment that is displayed.

Through personalization, users can select to view target and actual values for past periods as historical data, and historical variance that is calculated:

Historical variance = (current actual value − previous actual value) / previous actual value

See Chapter 29, "Working with SmartViews," Configuring Display Options for Historical Data, page 473.

Security for Audience and Segment Selection

To select audience and segments for the SmartViews, users must either be a team member, or share a role that the audience or segment has specified as a team role.

See Chapter 29, "Working with SmartViews," Viewing SmartViews, page 466.

Security for Actions

SmartViews determine the list of available actions on the SmartViews based on the permission that is given to the sign-on user and the availability of the components that perform the actions. For example, if a user doesn't have permission to create a marketing dialog, this action is not available when the user accesses the My SmartViews page, even if PeopleSoft Marketing is licensed.

Users cannot create account, audience, or segment plans if a SmartView template is selected to view the SmartViews.

See .

Setting Up SmartViews

This section discusses how to:

- Define system data.
- Define metrics.
- Specify time frames for metric updates.
- Define SmartView templates.
- Generate audiences.
- Schedule process for caching metric data.
- View scheduled update results.

Pages Used to Set Up SmartViews

Page Name	Object Name	Navigation	Usage
SmartViews System Data	RPM_SYSTEM_DATA	Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data	Specify the currency code, display option, and actions that users can perform on SmartViews.
Metric	RSP_GOAL_TBL	Set Up CRM, Product Related, SmartViews, Define Metrics, Metric	Define metrics that are used to measure SmartViews performance. They are identical to goals in Strategic Account Planning and can be referenced in SmartView templates if you don't license Strategic Account Planning. Both metrics and goals can be aggregated if specified; while the system uses the aggregated goal value to perform target value validation, the aggregated metric value is currently not used in any processing.
Update	RPM_GOAL_UPDATE	Set Up CRM, Product Related, SmartViews, Define Metrics, Update	Specify the time frames by which the metric value needs to be calculated and updated in data mart.
SmartView Template	RSP_PLANNING	Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template	Define templates for SmartViews. Use these templates to view the SmartViews if you do not use Strategic Account Planning plan templates.
Configure Search Save	RB_FILTER_SAVE	Click the Save Search Criteria link on the search page of any component that supports the generation of audiences in the configurable search page.	Create an audience in the configurable search page.
Schedule Updates	RPM_TL_RUN	Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates	Schedule to run an application engine process that updates metric data.
View Updates Result	RPM_UPDATE_SRCH	Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result	View status information on goals and metrics after the update process has run.

Defining System Data

Access the SmartViews System Data page.
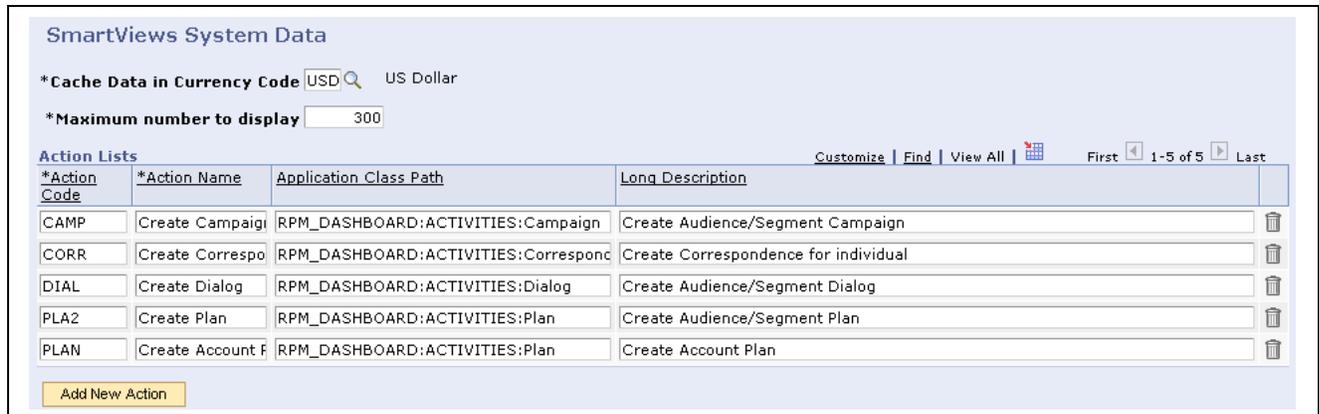
SmartViews System Data page

Note. A user with the SmartViews Administrator role should complete the setup on this page before data caching for SmartViews begins. This is a one-time setup that you will seldom change. If you do make changes on this page, the system requires that you clear all of the cached data for the new setup to take effect.

Cache Data in Currency Code	Select the default currency that is used for computing goal or metric data and populating it in data mart.

Warning! Refrain from changing this value after the system is in production—it can cause unexpected behavior in the system.

Maximum number to display	Enter the maximum number of customers to display for an audience in the My SmartViews page. To optimize performance, the suggested value is *300*. In addition, users can set up the filter to refine the list customers that return.

Action Lists

This grid contains a list of system delivered actions that you can invoke for the SmartViews. Engage consulting effort if you wish to add custom action; SmartViews provides the infrastructure where you can reference the custom application class code that is written to execute respective actions.

See Also

Defining Metrics

Access the Metric page.

Metric page

SmartViews supports the use of goals, which are defined for use in Strategic Account Planning and SmartViews, in SmartView templates. Define metrics if you do not license Strategic Account Planning. Metrics are applicable to SmartView templates only.

Goal Name and **Short Name**	Enter the standard (required) and short names of the metric.
	Give a descriptive short name and limit its length to 10 characters or fewer. SmartViews displays the short names of metrics as part of the column headings to identify the metrics. If the short name is not available, the system takes the first 10 characters of the standard name to be the short name.
Usage	Displays the application that uses the metric. The value is always *SmartViews,* and it's not editable.
	If you define a goal, the usage can be *SmartViews, Planning* (strategic account planning), or *Both.*
Term Name	Specify an Active Analytics Framework term that is used to retrieve data for the metric for measuring SmartViews performance.
Type	Select the type of data that is returned. Choose from *Amount, Other, Percent,* and *Quantity.*
Variance Indicator	Select to indicate whether a high attainment is positive or not. Options are: *High is Positive* and *Low is Positive.*
	For example, if the term is *number of leads* and it's good that the returned value is higher than the target value, select *High is Positive* for this term.

See Also

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

Specifying Time Frames for Metric Updates

Access the Update page.

Update page

Can Be Used In Real Time	Select this check box if you want the metric to automatically update when you click the Fetch Real Time Data button on the My SmartViews page. When you click this button, the system updates the actual values for all the metrics and goals, which have this check box selected, that appear on the page.
	Fetching realtime data for terms can affect system performance, especially KPI (key performance indicator) terms that reference data from external sources. Be cautious about enabling this option for terms.

Timeframe To Be Updated

This grid lists the time periods within which the metric data is updated. Select from the predefined active time periods that are established in the Time Frames component with usage set to either *all* or *planning & SmartView.* Selecting a time frame automatically populates the Begin Date and End Date fields.

Enter a date range using the Date to Begin Calculation and Date to End Calculation fields for the system to determine if a schedule update needs to occur. When the time comes, the system verifies that the start time falls within this date range; if it does, the update for the corresponding time frame takes place.

If you select the metric to be updated through the AE program, the program retrieves data for the metric within the selected time frames at a frequency defined in each one of them.

Note. When defining a time frame period for use in SmartViews, make sure that you enter a 10-character short description, which is used to specify the time frame on the column heading for each goal or metric.

See Also

Chapter 15, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 211

Chapter 28, "Setting Up SmartViews," Setting Up SmartViews, page 456

Defining SmartView Templates

Access the SmartView Template page.

SmartView Template page (1 of 2)

SmartView Template page (2 of 2)

The interface of the SmartView Template component is almost identical to the Planning Template component. The differences between the two components are:

• Some page fields that are specific to planning templates are not displayed in the Template Details group box; for example, Usage, Plan Type, Frequency, Currency and Lock Down Changes to Plan Targets.

• The Objectives and the Plan Team Members group boxes do not appear.

See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*, "Setting Up Planning Templates".

Generating Audiences

This section discusses how to generate audiences and segments using the saved search method. For more information on other ways to generate audiences and segments and their functionality, please refer to the documentation for the marketing application.

Access the search page of the Lead, Opportunity, Person, or Company component and click the Save Search Criteria link after performing a search you wish to save.

Configurable Search Save page

In addition to saving your search criteria for future use, you can save the search result as an audience. Make sure that the Publish check box is selected so that the audience can be used in SmartViews after it is generated.

Please refer to the PeopleSoft Marketing documentation for more information about creating segments and other ways to generate audiences.

See Also

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "Using Audiences," Creating and Managing Audiences

Scheduling Processes for Caching SmartView Data

Access the Schedule Updates page.

Schedule Updates page

Note. Do not put spaces in the run control ID.

In the Goals/Metrics grid, enter the goals and metrics to be updated. When you click the Run button on this page, you are transferred to the Process Scheduler Request (PRCSRQSTDLG) page. The system invokes the Run Data Mart Application Engine program (RPM_DATAMART), which retrieves and computes new values for selected goals and metrics as scheduled and populates them in data mart.

It is recommended that you categorize goals and metrics by frequency (yearly, quarterly, monthly, and so on) and create run controls for each applicable frequency. You can then specify the recurring time interval in each run control that is appropriate to its goals and metrics. You can define new recurrence definitions if necessary.

Access to this page is granted to users with the role of SmartView Administrator.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Viewing Scheduled Update Results

Access the View Updates Result page.

View Updates Result page

This page displays the update status of each goal or metric after the process has run—success or failure. If no goals are defined to be updated, then no status is displayed.

The size of the View Updates Result grid increases over time and, in most cases, you do not need to view schedule updates from more than a week ago. You can set up the system to empty the PeopleSoft Process Scheduler tables and file system periodically. Set this up on the Purge Settings page. For more information about system purge options, please refer to the documentation for PeopleSoft Process Scheduler.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 29

Working with SmartViews

This chapter discusses how to work with SmartViews.

Working with SmartViews

This section discusses how to:

- View SmartViews.
- Configure SmartViews.
- Personalize templates for display.
- Configure display options for historical data.

Pages Used to Work with SmartViews

Page Name	Object Name	Navigation	Usage
My SmartViews	RPM_DASHBOARD	My SmartViews, My SmartViews	View your SmartViews.
Create Campaign Page	RPM_CAMPAIGN	Select *Create Campaign* from the Action field and click the Go button.	Create campaigns for selected audiences or segments.
Create Correspondence Page	RPM_CORRESPONDENCE	Select *Create Correspondence* from the Action field and click the Go button.	Create correspondence requests for selected accounts or segments.
Create Dialog Page	RPM_DIALOG	Select *Create Dialog* from the Action field and click the Go button.	Create advisor dialogs for selected audiences or segments.
Configure My SmartViews Profile	RPM_SETUP	Click the Configure toolbar button on the My SmartViews page.	Select audience or segment groups that the SmartViews is built for and templates that are used to look at the SmartViews.
Personalize Template	RPM_PERSONALIZE	Click the Personalize toolbar button on the My SmartViews page.	Select which goals or metrics and their data types to display on the SmartViews.
Set Template Metric History	RPM_HISTORY	Click the Edit History link on the Personalize Template page.	Configure options to display historical data.
Create Plan	RPM_PLANS	Select *Create Account Plan* from the Action field and click the Go button.	Create account plans for selected accounts.
Audience Plan	RSP_PLANNING	Select *Create Audience Plan* from the Action field and click the Go button.	Create audience plans for selected audiences.

Viewing SmartViews

Access the My SmartViews page.

Viewing an audience on the My SmartViews page

Viewing a segment group on the My SmartViews page

The view of this page pertains to the sign-in user. When users access this page for the first time, the system displays the Configure My SmartViews Profile page, where they select at least one audience or segment group and one template to build their own SmartViews.

On the My SmartViews page, users review how each member of the selected audience or segment group performs based on the retrieved data that is defined from the selected template.

They can personalize the SmartViews by choosing which goal or metric data columns appear and how historical data is handled. Users can also make changes to target values directly in the SmartViews and save changes to the corresponding plan, if a plan template is used. If necessary, they can perform actions on selected audience or segment group members.

When users click the segment or audience link to transfer to the actual segment and audience, the customer counts that are displayed in parenthesis on the My SmartViews page can be different from what is shown in the component. This is because the number on the My SmartViews page denotes the number of companies or partners in that audience or segment, whereas, in the actual component, the number is translated to the number of contacts associated with the companies or partners.

The SmartViews shows a maximum of eight terms. Every historical data for a term is also treated as a term. SmartViews provides a personalization option for users to refine the data they want to see if there are more than eight terms.

Time Frame	Select a time period within which the SmartViews is displayed. The selected template dictates the available time frames in this drop-down list box. When you select a different template, the values in the Time Frame field may change accordingly.
	For planning templates, the time frame selection always includes the current period specified in the template, the period previous to the current period, and the period after the current period.
	For SmartViews templates, the time frame selection consists of the applicable time frame period type in the system for the current time you're looking at the SmartViews.
	For example, if you access your SmartViews in January 1, 2006, the applicable time frame may include *2006 January, 2006 first quarter, 2006 fiscal year,* and so on, depending on the time frame period types that are defined.
	For each of these time periods, the selection also includes the one before and the one after the current one. Therefore, for the 2006 January time period, additional time frames 2005 December and 2006 February become available in the Time Frame drop-down field.
Update Display	Click to refresh the My SmartViews page. Make sure to click this button after making changes to the SmartView, Template, Time Frame, or Currency field.
	Indicates the audience list. Clicking the adjacent audience link transfers you to the actual audience in the Manage Audiences component in a new browser window.
	Indicates consumers. Clicking the adjacent consumer link transfers you to the actual consumer in the Consumer component in a new browser window.
	Indicates partners. Clicking the adjacent partner link transfers you to the actual partner in the Partner component in a new browser window.
	Indicates workers. Clicking the adjacent worker link transfers you to the actual worker in the Worker component in a new browser window.
	Indicates companies. The lowest level of a segment group or audience is always companies. Clicking the adjacent company link transfers you to the actual company in the Company component in a new browser window.

?	Indicates that the type of the corresponding entity is unsupported, for example, site or broker.
	Indicates the segment group.
and	Indicate segments. Clicking the adjacent segment link transfers you to the actual segment in the Segment component in a new browser window. If you're in metric mode, click the second folder button of a segment to view a list of customers that belong to the segment. The presentation is identical to viewing an audience. Click the third folder button to return to the segment group view. This drill-down capability is not applicable to the plan mode. The SmartViews is in plan mode when a planning template is in use.
Save Target	Click to save changes you make on target values to the corresponding plan. This button doesn't apply if the SmartViews is in the metric mode (meaning a SmartViews template is in use).
Email	Click to access the Email SmartView page, where you can send email to interested parties with the SmartViews as a .csv attachment. Users need to have an email address defined in the CRM system to send emails on this page. The SmartViews is sent to the user's email address that is specified for the *business* type on the Worker page.
Apply Filter	Click to access the Filter SmartView page to filter customers that you see on the SmartViews. By default, the SmartViews shows 300 rows of data (recommended). Specify the row display setting on the SmartViews System Data page. If you want to change the filter criteria, click the Change Filter button to access the Filter SmartView page and modify the values. Click the Remove Filter button to delete the filter. These two buttons appear only when you have applied filter to the audience or segment group on your SmartViews. **Note.** The Apply Filter button does not appear in plan mode.
Configure	Click to access the Configure My SmartViews Profile page to select audience (and segment groups) and templates to view the SmartViews.
Personalize	Click to access the Personalize Template page to select which goals or metrics and their data types to display on the SmartViews.
Fetch Real Time Data	Click to immediately update the actual data for goals and metrics that is enabled for realtime update. The update applies to data in the time period you're currently viewing.
Validate Target	Click to validate the aggregated target values of accounts (or child segments) with the total value at the audience (or segment) level and show the result as pop-up window messages. The system disables this button when a SmartViews or an account template is in use, or when a filter is applied. This functionality is not applicable to goals or metrics that cannot be aggregated as defined.
Download	Click to export the SmartViews grid to a spreadsheet in a new browser window.
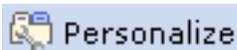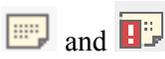
☐ and ☐

Click to access the Summary page to view information pertaining to the corresponding customer. Both icons provide information about the data fetching result and list existing plans that the corresponding customer may have. The alert icon (the one with the exclamation point) is used typically when the system is unable to get certain data and someone in the team may need to review the issue. If you want to review the data fetching result and don't want to click the icon every time, place the cursor over the links; the system displays information about the result.

Action

Select an action to perform for selected customers. System-delivered options include *Plan, Campaign, Dialog* and *Correspondence.* You can create custom actions by writing application class code and referencing it in the SmartViews System Data page.

You can select to add an audience plan or account plan if you view an audience using a planning template (for audience and segment) on the My SmartViews page. Create one type of plan for the selected customers or accounts at a time.

If you create a campaign for an activity type that uses any of the listed marketing channels, you need to enter the corresponding required values on the Activities page of the Marketing Programs component to save the campaign:

• Order Capture channel: list, offer, and script name are required.

• Facsimile channel: list and package are required.

• Telemarketing channel: content, offer list, script name, and integration are required.

• Mail channel: list and package are required.

• Sales Agents channel: list is required.

• Advisor channel: advisor ID is required.

Configuring SmartViews

Access the Configure My SmartViews Profile page.

Configure My SmartViews Profile page

Highlight Real-Time Data	Select to let the system highlight the new and changed data after the fetch realtime data process is complete.

SmartView

This grid lists the audience and segment groups that become available for selection in the SmartView drop-down list box on the My SmartViews page. Select an entry as a default value that always shows up in the SmartView field. To add a new audience or segment group, click the corresponding button to add a new row. If you don't use PeopleSoft Marketing, the Add Segment Group button does not appear.

Note. If you access this page and change the default SmartView while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

Currency Code	Select the default currency to use when this audience or segment group is selected.
Total Count	Specify the number of customers in this audience or segment group.

Template

This grid lists all the planning and SmartViews templates that are created in the system with either goals or metrics. Selected templates become available in the Template drop-down list box on the My SmartViews page. While you can select both active and draft templates to be included in the Template drop-down list box, only the active ones are available at runtime. Specify an active template as the default template used to display your SmartViews.

Note. If you access this page and change the default template while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

Personalizing Templates for Display

Access the Personalize Template page.

Personalize Template page

The Status, Target, and Variance check boxes are disabled if you select a SmartView template.

Enable	Select to show the corresponding goal or metric on the My SmartViews page.
Status, Target, Actual, Variance, and **History**	Select the corresponding check box to display data about the goal or metric on the SmartViews:

- Status displays the assessment icon of the goal for each customer. It applies to planning templates only.

- Target displays the current target value of the goal for each customer. It applies to planning templates only.

  If the goal is marked as prorated in Strategic Account Planning, a Prorated-T (prorated target) column is shown on the My SmartViews page if the Target check box is selected.

- Actual displays the current actual value of the goal or metric for each customer.

  Actual data comes from Strategic Account Planning when SmartViews are in plan mode. In metric mode, SmartViews data is retrieved from the data mart. Because of the difference in the way data is returned, discrepancies may occur if the times when the data was retrieved from both mechanisms are not the same.

- Variance displays the current variance value of the goal for each customer. It applies to planning templates only. The variance value is calculated as:

  Variance = (actual value − target value) / target value

- History displays historical information about the goal or metric for each customer.

| **Edit History** | Click to access the Set Template Metric History page and specify the criteria for displaying historical data on the SmartViews. |

Configuring Display Options for Historical Data

Access the Set Template Metric History page.

Set Template Metric History page

| **Period Type** and **Number of Past Periods** | Display the time periods for which historical data can be displayed. The available periods are determined by the period types that are defined in the system. |
| | For example, if the *monthly* period type exists in the system, you can see two period types on this page that pertains to it: *monthly* and *same month of past years*. If you enter *2* as the number of past periods for the *monthly* period type, the system returns two columns of past data for the two months previous to the current date. If you enter *2* as the number of past periods for the *same month of past years* period type, the system returns two columns of past data for the same month as the current date but from the past two years. |

> **Note.** The relevant time frame periods in the past must be defined and remain active for the past data to be displayed. Establish time frame periods in the Time Frames component. The usage must be set to either *All* or *Planning & Portfolio* for use in the SmartViews.

Target	Select to display the target value of the past periods (not available if the SmartViews is in the metric mode). Past target values are not editable.
	The Prorated-T column (reflecting current data) does not apply to historical target data.
Actual	Select to display the actual value of the past periods.
Variance	Select to display the current variance value (not available if the SmartViews is in the metric mode).
History Variance	Select to display the history variance of the current and the past data. History variance applies to time period of the same type.

See Also

APPENDIX A

Managing PeopleSoft Customer Relationship Management Integration Points

This chapter provides an overview of the interactive services repository, PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration points, and discusses how to:

- Process PeopleSoft Business Interlinks transactions.
- Process inbound service operations.
- Process inbound transactions.
- Process outbound service operations.
- Set up chunking.
- Publish outbound service operations.

Understanding the Interactive Services Repository

The Interactive Services Repository (ISR) is a compilation of information about the numerous service endpoints exposed by Oracle's PeopleSoft Enterprise, JD Edwards EnterpriseOne and JD Edwards World product families. Integration Points, also known as EIPs or XPBs, are the web service connections that allow PeopleSoft and JD Edwards applications to work smoothly with third-party systems and software, as well as other Oracle applications.

ISR works in conjunction with PeopleBooks to help users and implementation specialists fully explore the integration capabilities of our products. ISR has replaced the Enterprise Integration Points Catalog on Customer Connection.

Developers use ISR to document the technical structure of an integration point, its design patterns, and underlying technology. Analysts will use ISR to explore and understand integration points from a business process context. This is especially useful when implementing an Oracle-supported reference business process across multiple products and release versions.

Key Search Features of ISR

ISR contains high-level information about each integration point, including:

- Brief description.
- Product family.
- Product owner.
- Business Process association.

- Data rules.

- Setup rules.

ISR enables you to quickly discover the integration points that are relevant to your specific needs. You can search for integration points by name, integration set, product, between products, business process, and technology type. To access ISR, go to Customer Connection and select Implement, Optimize, and Upgrade, Implementation (or Optimization, or Upgrade) Guide, Implementation (or Optimization, or Upgrade) Documentation and Software, Interactive Services Repository (ISR).

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Understanding PeopleSoft CRM Integration Points

PeopleSoft CRM integration points enable you to:

- Send or publish service operations to a third-party system.

- Accept or subscribe to service operations from third-party systems.

- Send a synchronous request and reply transaction to a third-party system for processing.

Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft CRM needs to call an external system vendor's application to request information. This information must be provided in a realtime, synchronous mode. The PeopleSoft application waits for the answer from the other application in realtime, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output to be received from the external system. The data that is passed from the interlink object is interpreted by an interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, and then passes it, in the correct form, back to the interlink object.

Note. Business Interlink are just one of the ways you can process realtime transactions. There are many different ways you can capture this kind of information. Please refer to the ISR section on Customer Connection for more information.

See Also

http://www.peoplesoft.com/corp/en/iou/isr/index.jsp

Enterprise PeopleTools PeopleBook: PeopleCode API Reference

Processing Inbound Service Operations

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

See http://www.peoplesoft.com/corp/en/iou/optimize/doc_software.jsp

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:

Application Message Based Transaction

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by setting the queue status to run for each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes get associated to handlers. Handlers are then defined on a service operation.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages.

Electronic Data Collection Transaction Pages

PeopleSoft CRM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error,* and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts (select PeopleTools, EDI Manager, View EDI Audit Trail, Transaction Maintenance).

For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Processing Outbound Service Operations

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The PeopleSoft Application Messaging technology is utilized to format and publish industry standard XML messages. For example, as item master information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item master tables.

Understanding the Outbound Transaction Architecture

PeopleSoft CRM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

Component or Incremental Publish

The system generates Component Published messages immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

Batch Publish

Batch Publish messages provide the functionality to group many like transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may go through third-party software that converts the XML message to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft CRM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or "chunk" messages as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables—that is, relatively static, low volume tables keyed by setID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables—that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

APPENDIX B

Delivered Web Service and Service Operations

This appendix discusses the delivered web service and service operations for the Task component.

Delivered Web Service

This section discusses:

• Task web services.

• How to view the Task message elements.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Task Web Service

PeopleSoft CRM delivers these service operations for the Task web service:

• Create Task

This service operation is a synchronous process that takes task-related data as input and creates a task record with associated child records in CRM. No recurring tasks can be created through this web service for this release. Similarly attachments can't be part of the task notes.

• Get Task

This service operation returns a task record and it's associated child record based on a unique identifier that is passed in a message. The user ID that is passed in the message determines the tasks that the user is authorized to view

• Search Task

This service operation returns a list of task records and their associated child records based on the criteria field values passed in the input message. While searching the task, the system enforces security, The user ID that is passed in the message determines the tasks that the user is authorized to view.

• Search Task Type

This service operation returns a single task type or a list of all defined task types based on a set of search criteria.

• Notify on Task Complete

When the task status is changed to either completed or canceled for a task, the system sends a response message to the application that is calling the information, indicating the status change. This is an asynchronous operation.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Task web services:

Service Operation	Operation Type	Request Message	Response Message
Create Task (RB_TASK_CREATETASK)	Synchronous	RBTASKCREATEREQ	RBTASKCREATERES
Get Task (RB_TASK_GETTASK)	Synchronous	RBTASKGETREQ	RBTASKGETRES
Search Task (RB_TASK_SEARCHTASK)	Synchronous	RBTASKSEARCHREQ	RBTASKSEARCHRES
Search Task Type (RB_TASK_TASKTYPELIST)	Synchronous	RBTASKTYPELISTREQ	RBTASKTYPELISTRES
Notify on Task Complete (RB_TASK_NOTIFYONCOMPLETE)	Asynchronous (Request /Response)	RBTASKNOTIFYONCOMPLETE REQ	RBTASKNOTIFYONCOMPLETE RES

Viewing the Task Message Elements

You can view the elements and fields that are included in each Task operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.

2. Enter *RB_TASK* in the Message Name field and click Search.

   The system lists all the messages that are related to Task.

3. Select the message you want to view.

4. Click the message name link under the Parts grid.

   The system opens the Message Definition page in a new browser.

5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
	In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.
	See also *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.

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. 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). 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.

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.
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.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.
	In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *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).

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.

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.

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.

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.
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.

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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