

# CUSTOMER RELATIONSHIP MANAGEMENT - INFORMATION SOLUTIONS



*Software  
Documentation at  
your fingertips*

*Training when and  
where you need it*

*Increase employee job  
satisfaction and  
productivity*

*Oracle PeopleSoft Enterprise offers many information solutions to help you and your employees succeed. Take advantage of our PeopleBooks, Documentation Updates, Instructor-Led Training, Online Classes, User Productivity Kits (UPK), Self-Study CD's, Certification Programs, and other helpful information.*

PeopleSoft Enterprise Information Development and the entire PeopleSoft Enterprise organization are dedicated to providing quality information solutions to help you and your employees succeed. To help manage your business and maximize the value of your software investment, just follow the links below.

## **PeopleSoft Enterprise Information Portal**

The PeopleSoft Enterprise Information Portal provides you with a single entry point to locate the documentation, training, and other useful information you need to help with your implementation process and improve your daily experience with our products. Customers searching for this information should make this their first online destination.

<http://www.oracle.com/applications/peoplesoft-information-portal.html>

## **PeopleBooks**

Our PeopleSoft Hosted PeopleBooks website allows you to access an HTML installation of our PeopleBook suite, including Search capabilities. This hosted solution also allows you to access PeopleBooks using the help link in your applications without having to install PeopleBooks on your own server. To enable context sensitive help, follow the simple instructions on the website's opening page.

<http://www.oracle.com/pls/psft/homepage>

If you want access to PDF versions of PeopleBooks, use this link.

CRM: [http://download.oracle.com/docs/cd/B31349\\_01/psft/html/docset.html](http://download.oracle.com/docs/cd/B31349_01/psft/html/docset.html)

## **Researching in PeopleBooks**

This free, short course gives users of PeopleBooks a better understanding of the documentation structure and organization as well as techniques for finding information more quickly and easily by utilizing search functionality, best practice search strategies, and indexes.

[http://oukc.oracle.com/static05/opn/peoplesoft/Researching\\_in\\_PeopleBooks/Researching\\_in\\_PeopleBooks/index.htm](http://oukc.oracle.com/static05/opn/peoplesoft/Researching_in_PeopleBooks/Researching_in_PeopleBooks/index.htm)

**Installation Guides**

[http://download.oracle.com/docs/cd/E05446\\_01/psft/html/docset.html](http://download.oracle.com/docs/cd/E05446_01/psft/html/docset.html)

**Hardware/Software Guides**

[http://download.oracle.com/docs/cd/E10519\\_01/psft/html/docset.html](http://download.oracle.com/docs/cd/E10519_01/psft/html/docset.html)

**Upgrade Documentation**

[http://download.oracle.com/docs/cd/B31678\\_01/psft/html/docset.html](http://download.oracle.com/docs/cd/B31678_01/psft/html/docset.html)

**Getting Started on Your PeopleSoft Upgrade:**

[http://download.oracle.com/docs/cd/E05019\\_03/psft/html/docset.html](http://download.oracle.com/docs/cd/E05019_03/psft/html/docset.html)

**Metalink Resources – password required**

**CRM Documentation Home Page** (links to all of your product documentation needs in one, convenient location).

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=751976.1>

**Upgrade Documentation**

[CRM 8.4x, 8.8x, and 8.9 to 9.0MP5 Upgrade Guide](#)  
[CRM Advanced Configurator Upgrade Guide](#)

**Evaluate, Plan, Execute – upgrade resource page**

<https://metalink3.oracle.com/od/faces/secure/km/BrowseResults.jspx?fid=15389.1>

**Cumulative Feature Overview Tool**

The new Cumulative Feature Overview Tool provides concise descriptions of new and enhanced solutions and functionality that have become available between starting and target releases. Customers simply identify the products they own, their existing release, and their target implementation release. With a single click the tool quickly produces a customized set of high-level, concise descriptions of features developed between their starting and target releases.

[CRM Cumulative Feature Overview Tool](#)

**CRM Installation Guide**

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=702941.1&h=Y>

**CRM Hardware/Software Guide**

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=703684.1&h=Y>

**Interactive Services Repository (ISR)**

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=735571.1>

**Advisor Webcasts**

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=740964.1>

**Red Paper Library**

<https://metalink3.oracle.com/od/faces/secure/km/BrowseResults.jspx?fid=14839.1>

**White Papers**

- [Integrating with Communications Billing Systems](#)
- [Manage Energy Customers Profitably](#)
- [Customer Relationship Management in the Financial Services Industry](#)
- [Creating a Constituent-Focused Government](#)
- [Creating a Customer-Centric Insurance Enterprise](#)
- [Employee Self Service](#)
- [HelpDesk for Human Resources](#)
- [Customer Portfolio Management: Taking CRM to the Next Level](#)
- [Usability in Enterprise Customer Service Applications White Paper](#)
- [Are you Exceeding your Customer's Expectations White Paper](#)

**Business Process Models**

Customers have access to Business Process Models for CRM, EPM, FSCM and HCM products after purchasing the respective Process Modeler applications. Contact your Account Executive for details.

**Entity Relationship Diagrams (ERD's)**

ERD's are created and managed by Product Development. They are provided to customers by request. To obtain ERD's, call the Global Support Center or log a case on Customer Connection

**PeopleSoft Enterprise Application Information**

Oracle.com point of entry for additional PeopleSoft Enterprise Customer Relationship Management information such as "what's new", white papers, data sheets and other helpful information.

<http://www.oracle.com/applications/peoplesoft/crm/ent/index.html>

### CRM Data Sheets

Data sheets provide concise overview information about our products. Click the link to view the data sheet.

- [CRM Advanced Configurator](#)
- [Enterprise FieldService](#)
- [CRM Help Desk](#)
- [Enterprise Mgr Connector for Help Desk](#)
- [CRM Employee Self Service](#)
- [Infosync](#)
- [Marketing](#)
- [Order Capture](#)
- [Multichannel Communications](#)
- [Online Marketing](#)
- [Advisor](#)
- [Sales](#)
- [Strategic Account Planning](#)
- [Support](#)
- [Telemarketing](#)
- [Workforce Communications](#)

### Curriculum – Oracle University:

#### CRM Courses:

Oracle offers the following instructor-led training (ILT) and recorded webclass (RWC) courses. Click the course name to view the signup page.

- [CRM Automation and Configuration - ILT](#)
- [CRM Fundamentals - ILT](#)
- [Introduction to PS for CRM - RWC](#)
- [Multichannel Communications - RWC](#)
- [HelpDesk for Human Resources - ILT](#)
- [Support and HelpDesk - ILT](#)
- [Order Capture - ILT](#)
- [Partner Relationship Management - RWC](#)

**Oracle University Main Website:**

[www.oracle.com/education](http://www.oracle.com/education)

**Transfer of Information (TOI) Webcasts:**

[http://oukc.oracle.com/static05/opn/customer\\_toi/psft\\_login.html](http://oukc.oracle.com/static05/opn/customer_toi/psft_login.html)

First-time users of this site will be prompted to complete a brief registration form. After filling out the form, you will have access to the full customer library of TOI's.

**User Productivity Kits – (UPK)**

<http://www.oracle.com/goto/upk/user-productivity-kit.html>

- For UPK Content, please see the UPK Resource Library at:  
[http://www.oracle.com/applications/tutor/upk\\_collateral.html](http://www.oracle.com/applications/tutor/upk_collateral.html)

**Contacting Information Development**

PeopleSoft Enterprise Information Development always likes hearing from our customers. To contact us, send an email to [pssoft-infodev\\_us@oracle.com](mailto:pssoft-infodev_us@oracle.com).

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