

PEOPLESOFT ENTERPRISE HELPDESK



Maximize operational efficiency.

Provide exceptional support to your workforce.

Create a global internal support organization.

Your corporate help desk is the lifeline of your company, ensuring that the systems and facilities that employees need to do their jobs are running smoothly—at all times. The help desk is key to increasing the productivity of the people who support your customers and extend your business.

Oracle's PeopleSoft Enterprise HelpDesk enhances the overall speed and quality of internal support operations by optimizing the efforts of your help desk staff and providing comprehensive process automation. With PeopleSoft HelpDesk, you can leverage real-time enterprise data to provide faster, more accurate internal support, maximize employee productivity, monitor service performance, and control service costs.

Maximize Operational Efficiency

Internal support operations exist to ensure that essential systems and facilities are always available and running smoothly, and that the workforce is as productive as possible. At the same time, help desks must be able to demonstrate that the total cost of support, including personnel, operations, and system maintenance, remains as low as possible.

Process Automation and Best Practices

By automating business processes and employee best practices, your organization can save significant amounts of time, effort, and money. Out of the box, PeopleSoft HelpDesk supports process management standards that include IT Infrastructure Library (ITIL) and the Information Technology Service Management (ITSM) Reference Model, and has been certified by Pink Elephant, the recognized leader for ITIL compatibility certification.

Change Management

The ability to make quick and efficient changes to complex, technology-dependent business models saves money and strengthens operations, which is why change management is the backbone of IT operations. The change management functionality within PeopleSoft HelpDesk improves availability, performance, and throughput by ensuring that standardized methods and procedures are used for efficient and prompt handling of all changes. You're able to minimize the impact of change-related incidents on service quality, which ultimately cuts costs and improves daily operations.

System Management Integration

Through our system management integration framework, PeopleSoft HelpDesk interfaces with other applications, including Oracle's Enterprise Manager, and leverages existing information about employees and IT assets. This dramatically improves service efficiency and effectiveness by arming agents with all the information required to resolve employee matters at first contact.

The screenshot displays the Oracle PeopleSoft Case Management interface. At the top, there is a navigation bar with options like 'Save', 'Print', 'Spell Check', '360-Degree View', 'Notification', 'Send', and 'Text Tray'. The case details include Case ID 209501, Employee ID CRM100, Employee Name Robert Harrison, Status Open - Research, and Contact Method 925/694-2001(4785). The interface is divided into several sections: Customer Information (Employee, Alternate Contact, Department, Location, Contact Method, Reported By), Case Information (Quick Code, Case Type, Status, Resolved by First Contact, Provider Group, Assigned To, Product Group, Product, Description, Problem Type, Serial Number, Asset Tag, Installed, Category, Specialty Type, Detail, Priority, Impact, Urgency, Severity), Problem (Summary, Description), and Actions (Suggested Action, Description, Related Actions). At the bottom, there is an Audit History section showing the case was created and modified on 11/30/2006 at 6:20PM PST by HELPMGR Robert Lynch.

Configurable Case Page

PeopleSoft provides the ability to tailor the case page through configurable options, so you can customize the user interface to be more appropriate to your business.

Usability and Role-Based Access

PeopleSoft HelpDesk is designed to ensure system usability and quick end user adoption, two critical elements for increasing agent effectiveness and reducing operating costs. Our emphasis on usability reduces training by enabling agents and employees to quickly get up to speed.

PeopleSoft's focus on Superior Ownership Experience improves user productivity, allows product configurability, and provides new functionality to better meet the needs of help desk agents. We accomplish this through:

- Actionable 360 Degree View of the Worker, which provides dramatic time savings by enabling your agents to carry over pertinent employee information from the 360-Degree View into a new case.
- Text Trays, which speed data entry for commonly keyed text. The text tray content is automatically populated into text fields using memorized keystroke combinations.
- Worklist Redesign, which improves your agent's ability to identify the most important work items, categorize and organize them into a personalized folder structure, and take action on them.

Asset Management Integration Framework

For asset management to be successful, sufficient processes, audit procedures, and technology must be in place. Through the Asset Lifecycle Management (ALM) solution suite that is part of the PeopleSoft Financials applications, you will have a complete end-to-end view of all of the financial, contractual, and physical data pertaining to IT assets. This holistic view enables your organization to dramatically reduce your operating expenses, while improving the IT services that you can provide to your employees.

The ALM integration is comprised of three primary integration points to PeopleSoft HelpDesk:

- IT asset management
- Asset lifecycle management (Asset Repository)
- Work order management

IT Asset Management Integration

PeopleSoft provides an integration framework to third party asset management solutions. This integration provides your help desk agents with the ability to perform web administration and diagnostic functions, including:

- Browsing IT asset inventory
- Remote control of IT assets
- Verification of asset configurations, installed software and network information
- Software delivery/patch management

Asset Repository Integration

Asset Repository Management (ARM) is a core component of the ALM solution suite. The ARM is a single repository for all organizational asset data (financial, contractual, and physical). This repository represents the single source of truth for all asset data. The integration between ARM and the HelpDesk application occurs through the CRM Installed Assets component. The ARM synchronizes with the CRM Installed Assets to share all IT Asset data.

Work Order Management

When your help desk agents work on a case that cannot be resolved via phone support, they can open a work order request to dispatch a technician on-site or to make a desk-side visit. This functionality is enabled through integration to the Maintenance Management application of the ALM solution suite. Your help desk agent creates a work order request that is sent to the Maintenance Management application where a work order is created and a technician is dispatched. Notifications can be sent to your help desk agents whenever the status is changed on the work order request.

Improve Workforce Support

To keep your workforce running smoothly, your help desk has to provide exceptional support to employees. PeopleSoft Enterprise HelpDesk provides robust

service management functionality designed specifically for internal operations, with powerful features that enable agents to resolve issues quickly and accurately. As a result, employees are well informed, systems are up and running, and productivity remains high.

Problem and Incident Management

Powerful, automated tools can facilitate problem and incident management. With branch scripting, agents can quickly identify issues or determine a course of action, while our solution advisor provides them with known solutions to specific problems. Agents also have access to diagnostic tools that ensure that support tasks are executed consistently and efficiently, including problem-solving techniques and solutions created by other agents. And to help you manage your knowledge base and keep current, the system tracks solution usage and success rates.

Skills-Based Routing

Service delivery improves when employees are connected to the most qualified resource during initial contact. PeopleSoft HelpDesk integrates with your human capital management system to provide powerful skills-based routing and competency-based case assignments. The system automatically identifies the agents who are best suited to solve specific issues, routing requests based on product, agent skills, location, and agent availability.

Knowledge Management

With the powerful natural language and keyword search capabilities embedded in PeopleSoft HelpDesk, agents can quickly determine the best solution to a problem—weighted, ranked, or scored by accuracy. This reduces problem-resolution time and enhances agent productivity by leveraging external content. Additionally, with Quick Code capability, agents can build rapid responses to the most frequently asked questions.

Configure workflow for solution authoring using the Active Analytics Framework (AAF) to initiate an approval process when an agent creates and submits a new solution from the case. Solution administrators can be proactively notified of new solutions for review and approval. Agents can be notified prior to adding the solution to the knowledge base.

Defect Management

Implementing a closed-loop process between employees, help desk agents, and engineering makes it possible to quickly address problems that affect productivity. With PeopleSoft HelpDesk's quality management capabilities, agents can send employee-reported product issues directly to engineering, enabling them to accurately inform employees of planned fixes and expected resolution time.

A 360-Degree View

With a 360-degree view of the Worker, agents have access to the information they need to deliver superior service, every time. The view provides an employee's profile, assets, reported cases, and interaction history, as well as system outage and product defect information that can affect productivity. It eliminates the need for agents to navigate multiple systems, significantly reducing training time and related costs.

The screenshot displays the '360-Degree View' for an employee. At the top, there are navigation tabs: '360-Degree View', 'Relationship Viewer', and 'Tasks'. Below this, a dropdown menu shows the role 'Worker' and an 'Add IT Helpdesk Case' button. The 'Summary' section contains fields for 'First Name' (Robert), 'Employee ID' (CRML00), 'Status' (Active), 'Last Name' (Harrison), 'Location' (California Location), and 'Effective Date' (01/01/1900). There are 'Apply Changes' and 'View Worker Details' buttons. The 'Activities' section includes a 'Date Filter' set to '6 - Last Year' and a tree view with nodes like 'Overview of - Robert Harrison', 'IT Helpdesk Cases - (0)', 'Assets - (5)', 'Installed - (5)', 'View All', 'Add Asset', 'Search Assets', 'Agreements - (0)', 'Change Requests - (0)', 'Work Orders - (0)', 'Defects - (0)', and 'Interactions - (0)'. The 'Assets (Installed)' section shows a table with columns 'Select', 'Product ID', 'Product Description', and 'Asset Tag'. The table lists several assets, including an ITN 4-in-1 Color Printer (SR1028) and an ITN Color Monitor (SR1028). Below the table are 'Actions' and 'Add Interaction Note' buttons. At the bottom, there are navigation buttons like 'Refresh', 'New Search', 'Notification', and 'Correspond', along with a 'Top of Page' link.

Employee 360-Degree View

The PeopleSoft HelpDesk 360-degree view consolidates employee information into a single user interface, providing a role-based view of an employee's profile, assets, and history of support interactions.

Employee Self-Service

Self-service provides greater convenience for employees and higher job satisfaction for agents, and it can greatly reduce the cost of providing support. Employees are able to perform routine tasks—such as searching for solutions, creating cases, checking issue status, or initiating an on-line chat with an agent—without agent intervention, leaving help desk resources free to focus on more important matters.

On Behalf of

For those times when it is either not possible or convenient to open a case for yourself, HelpDesk provides the ability to have a case opened on your behalf by another employee. This new functionality enables one employee to open a case listing a different employee as the primary contact.

Automatic Notification and Escalation

PeopleSoft HelpDesk simplifies issue notification and escalation processes with a robust and flexible workflow engine that speeds problem resolution. When an urgent case is reported, a task is completed, or a certain amount of time elapses, the system can automatically escalate the issue to another person or group or send a notice to an agent's or manager's e-mail or worklist.

Case Web Services

Oracle delivers web services for the common functions performed in the case transaction so that business processes can call these web services externally and leverage their associated case features. External systems can use the delivered case web services to perform typical operations such as creating a case, updating a case, searching for a case, or retrieving a case.

Role and Condition Based Configuration

Providing a user interface that is specific to the line of business, a user's role, or the issue the employee is calling about improves usability of the software by allowing your help desk agent to focus on only the information that is valuable in that specific circumstance. Case Display Templates provide you this flexibility and allow the automatic selection of a display template, thus dynamically displaying the case user interface (UI) that meets the needs of the different users, business units, and case issues.

For example, the case UI can vary depending on the line of business for the case. This could allow a help desk that handles IT and Facility inquiries in two different business units to have two different case UIs to capture information in a single HelpDesk implementation.

Tasks

Task functionality provides your help desk agents with the ability to assign tasks to themselves or to other agents. An agent can manually create tasks on a case to document his or her "to do" list for that case. Alternately, the Active Analytics Framework (AAF) can be used to automatically create a grouping of tasks for the case, based on specified criteria.

Service Level Agreements

Service level entitlements may be based on the priority of the issue, the department, the location, the employee role, or the source for reporting the issue (for example, self-service vs. phone). In addition to agreements and entitlements that are based on case criteria, default agreements can be created providing all employees with the same basic set of entitlements.

Active Analytics Framework (AAF) notifications can be configured to notify agents and management when case agreements have exceeded a percentage of their response or restore time. Thus agents and management can be alerted proactively of potential SLA exceptions so that they can take corrective measures.

Create a Global Support Organization

Our global support framework lets you unify and streamline your disparate internal support efforts into a single, integrated, global help desk—without compromising the support you provide to your local workforce.

Multichannel Capabilities

With PeopleSoft HelpDesk, your internal support operation can provide employees with a choice of communication methods, including Web self-service, phone, e-mail, chat, and fax. Oracle's PeopleSoft Enterprise CTI Integration enables a seamless user experience and common contact center functionality, including screen

pops, single sign-on, and agent configuration. With Oracle's PeopleSoft Enterprise MultiChannel Communications, you can quickly and accurately classify, route, and respond to incoming structured (such as Web forms) and unstructured e-mail.

Localization

Our open data model and our standard global functionality, which includes Unicode and multilingual and multicurrency capabilities, are unsurpassed.

The Oracle Advantage

Oracle's PeopleSoft Enterprise HelpDesk enables you to create a consolidated service desk that unites, streamlines, and globalizes your internal support operations. We provide the infrastructure and tools you need for operating a comprehensive internal support desk that spans a global enterprise, maximizes productivity for both agents and employees, and maximizes efficiency throughout your organization.

Oracle's PeopleSoft Enterprise HelpDesk has been verified as meeting the minimum functional requirements for ITIL compatibility by Pink Elephant—*The ITIL Experts*.

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