PeopleSoft HelpDesk

An organization’s corporate help desk is the lifeline of the company, ensuring 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 customers and extend the organization’s business reach.

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

Maximized Operational Efficiency
Internal support organizations exist to ensure essential systems and facilities are always available, running at optimum efficiency, and the workforce is as productive as possible. At the same time, support desks must be able to demonstrate the total cost of support, including personnel, operations, and system maintenance, remains as low as possible.

By automating business processes and employee best practices, an organization can save significant amounts of time, effort, and money. PeopleSoft HelpDesk supports complete end-to-end business processes and the management standards that are compatible with the IT Infrastructure Library (ITIL) and the Information Technology Service Management (ITSM) Reference Model.

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. The emphasis on usability reduces training by enabling agents and employees to get up to speed quickly.

PeopleSoft’s continued focus on superior ownership experience improves
**KEY BENEFITS**
- Optimize Contact Center effectiveness
- Maximize operational efficiency
- Provide exceptional support

**RELATED PRODUCTS**
The following Products Integrate with PeopleSoft HelpDesk:
- PeopleSoft Sales
- PeopleSoft Asset Management
- PeopleSoft Order Capture
- PeopleSoft Maintenance Management
- PeopleSoft CTI
- PeopleSoft Multichannel Communications

**RELATED SERVICES**
The following services support Oracle PeopleSoft HelpDesk:
- Update Subscription Services
- Product Support Services
- Professional Services

user productivity, allows product configurability, and provides new functionality to better meet the needs of help desk agents. This is accomplished through:

- The rich-text editor for case notes, enabling agents to compose formatted notes, including images, hyperlinks, and more. Users can also filter their case notes based on note type.

- Case Quick Code, which prepopulates a solution and solution status for a case. This makes quick case resolution even faster for agents, bypassing the need to search for solutions and resolving and closing the case with a single click of the Save button.

- Actionable 360-Degree View of the Worker, providing dramatic time savings by enabling agents to carry over pertinent employee information from the 360-Degree view into a new case.

- Text Trays that speed data entry for commonly keyed text. The text tray content is automatically entered into text fields by means of a memorized keystroke combination.

- The Worklist, which improves an agent’s ability to identify the most important work items, categorize and organize them into a personalized folder structure, and take the appropriate action. Agents can also delegate their worklist items to other agents or their supervisor in case they are unable to work the task promptly or they need a manager’s approval.

**Change Management**
The ability to make quick and efficient changes to complex, technology-dependent business models saves money and strengthens operations, making change management the backbone of the IT operation. The change management functionality within PeopleSoft HelpDesk improves availability, performance, and throughput by ensuring standardized methods and procedures are used for efficient and prompt handling of all changes. Organizations can minimize the effect of change-related incidents on service quality, ultimately cutting costs and improving daily operations. Item counts on the page tabs of Notes, Tasks, Related Changes, Related Actions, and Interested Parties are a visual clue to users. Users have the ability to search Change Requests by Provider Group or by Product ID. Any affected asset is updated immediately with new configuration information, such as the transfer of one asset to a new asset owner.
Asset Management Integration Framework

For asset management to be successful, sufficient processes, audit procedures, and technology must be in place. Through the Installed Asset functionality integrated with the PeopleSoft Financials Management System (FMS), organizations can have a complete end-to-end view of all the financial, contractual, and physical data pertaining to IT assets. This holistic view enables support operations to reduce operating expenses dramatically while improving the IT services provided to employees.

Through integration with PeopleSoft FMS, the asset repository is provided for all organizational asset data (financial, contractual, and physical). This repository represents the single source of truth for all asset data. The integration between PeopleSoft FMS and the CRM HelpDesk application occurs through the CRM Installed Assets component. PeopleSoft FMS synchronizes with CRM Installed Assets to share all IT asset data.

The Installed Asset feature provides three primary management capabilities to PeopleSoft HelpDesk:

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

PeopleSoft CRM provides an integration framework to third-party asset management solutions. This integration enables an organization’s help desk to perform web administration and diagnostic functions, including:

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

Work Order Management

When help desk agents work on a case that cannot be resolved via support through a phone, email, or other communication channel, 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 PeopleSoft Maintenance Management. A help desk agent creates a work order request that is then sent to the Maintenance Management system, where a work order is created and a
technician is dispatched. Notifications can be sent back to the help desk agents whenever the status of the work order request changes.

**Improved Workforce Support**

To keep the workforce running smoothly, the help desk has to provide exceptional support to employees. PeopleSoft HelpDesk provides robust service management functionality designed specifically for internal operations, with powerful features such as global and duplicate case alerting, enabling agents to resolve issues efficiently 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 the solution advisor provides them with known solutions to specific problems. Agents also have access to diagnostic tools that ensure support tasks are executed consistently and efficiently, including problem-solving techniques and solutions created by other agents. Moreover, to help support desks manage the knowledge base and keep it current, the system tracks solutions usage and success rates. PeopleSoft HelpDesk enables organizations to indicate how quickly a problem or case must be resolved in compliance with prioritization criteria of the incident with acceptable standards or best practices. By using the Urgency field on the Case, the agent can indicate the degree (High, Medium, Low) of the effect to the business in conjunction with the Priority field for the Case.

**Skills-Based Routing**

Service delivery improves when employees are connected to the most qualified resource during the initial contact. PeopleSoft HelpDesk integrates with the Human Capital Management system of choice---PeopleSoft Human Capital Management of Oracle eBusiness Suite Human Resources---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 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) is used to initiate an approval process when an agent creates and submits a new solution from the case. Solution administrators can be notified proactively of new solutions for review and approval. Agents can be notified prior to adding the solution permanently to the knowledge base.

**Defect Management**

Implementing a closed-loop process among employees, help desk agents, and engineering enables organizations to address problems quickly that may affect employee productivity. With PeopleSoft’s HelpDesk’s quality management capabilities, agents can send employee-reported product issues directly to engineering, enabling the capability to inform employees of planned fixes and expected resolution time.

**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, especially during off hours. Employees are able to perform routine tasks—such as searching for solutions, creating cases, checking issue status, or initiating an online chat with an agent—when an agent is available. This self-service capability can be provided without agent intervention, maximizing the call deflection and leaving help desk resources free to focus on value-added tasks.
Figure 1: Self-Service home page (called Service Center) is a central place from which users can access everything they need as a first step to get their questions or issues resolved.

Automatic Notification and Escalation

PeopleSoft HelpDesk simplifies the issue notification and escalation process with a robust and flexible workflow engine to speed problem resolution. When an urgent case is reported, a task is completed, or a certain amount of time has elapsed, the system can automatically escalate the issue to another person or group or send a notice to an agent’s or manager’s email or worklist.

Case Web Services

PeopleSoft delivers web services for the common functions that are performed in the case transaction so 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, and retrieving a case.

Multichannel Capabilities

With PeopleSoft HelpDesk, an internal support organization can provide employees with a choice of communication methods, including web self-service, phone, email, chat, and fax. PeopleSoft CTI enables a seamless user experience and common contact center functionality that includes screen pops, single sign-on, and agent configuration. With PeopleSoft Multichannel Communications, organizations can quickly and accurately classify, route, and respond to incoming structured and unstructured emails.

CONTACT US

For more information about PeopleSoft HELPDESK, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.