PeopleSoft Support is a powerful CRM application that provides the tools an organization needs to deliver an efficient and truly differentiated service experience to customers with the most cost-effective processes. Whoever the customer may be—students, employees, or those who buy your products or services—the PeopleSoft Support solution helps a contact center’s Customer Service Representatives (CSRs) maximize productivity while optimizing contact center effectiveness by turning contact centers into a customer retention and profit center.

**Global and Duplicate Case Alerts**

To make service interactions as efficient as possible and eliminate unnecessary task redundancy, the PeopleSoft Support application intelligently advises service agents that another agent may already be working on a potentially duplicate customer case and can alert the agent of widespread global issues that may affect the customer.

Through the 360-degree view, agents can easily see all current global issues that are known to affect the customer. If an agent determines the global case is indeed the issue affecting the customer, the agent can simply select the global case and, with the click of a button, automatically create a new case for the customer and associate it as a child with the global case. Alternatively, the agent can add the customer to the global case as an interested party.

A more sophisticated search match can be invoked directly from a case to identify global or duplicate cases that match the information entered in the customer’s case and to alert the agent.

**Case Reassignment and Service Level Agreement (SLA) Usage Monitoring**

To increase accountability during the case reassignment process, this feature enables agents and managers to identify which provider groups and individuals have been assigned to the case quickly and to determine whether they have contributed to the resolution within the customer-committed service level agreement. Each time the case is reassigned, the reassigned agent and
the provider group, the reassignment date and time, as well as the open case duration are recorded and tracked along with the percentage of the SLA that has been used by the agent or provider group.

This information is available in the assignment tracking section on the case, making all agents, provider groups, and their managers aware of how much time and SLA each assignee has consumed.

Case administrators can easily build workflow notifications that leverage the historical assignment data, duration of assignment, and SLA consumed to notify managers and interested parties if an SLA commitment might be or is missed. For analytic needs, reports can be built leveraging any reporting tool that will identify provider groups and agents meeting their throughput goals and where the bottlenecks may be.

**Guided Case Resolution with Task Management**

The guided case resolution with enhanced task management guides agents through case resolution task by task by enabling users to create predefined tasks, or Task Group templates, and manually or automatically initiating desired tasks. Agents can manually select the Task Group template from a drop-down list, which prepopulates one or more predefined tasks. Tasks that are populated can be pre-assigned to an individual or assigned to the agent at the moment the tasks are created on the case. Additionally, task due dates and durations can be pre-assigned.

Nontechnical administrators can easily create and set up Task Group templates, enabling a contact center to adjust rapidly to changes in policy and to create new task groups quickly and easily. Alternatively, the Active Analytics Framework (AAF) can be used to create a grouping of tasks automatically in the case based on specific criteria.

**Knowledge and Content Management**

Knowledge and Content Management are enabled with rich text editor, robust solution security, and the ability to search attachments to provide increased search accuracy and relevancy for both self-service and contact center users.

Using the solution advisor, CSRs can:

- Quickly obtain accurate search results that are scored and ranked by relevancy, using keywords.
- Search a broad range of knowledge base content, including solutions, external content in websites and file servers, scripts, similar cases, defects, and fixes.
- Assign content owners so solutions are updated and edited by those with the knowledge and responsibility to keep information current.
- Create visually compelling, content-rich, new solutions on the fly
so the most current and relevant knowledge can be shared with all CSRs in an organization.

- Configure workflow for solution authoring using the Active Analytic 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.

### Solution Security

The solution security that limits user access and visibility to solutions in the knowledge base allows the solution administrator to restrict access to solutions within solution libraries in both self-service and the agent-facing applications. Content that is either irrelevant or restricted can be filtered, with the result being faster, more relevant search results. The security criteria, which restricts access to solutions within solution libraries, are based on:

- **User Role** – Ensures agents, customers, and employees see solution content specific and relevant to their roles.
- **Agent Location** – Ensures agents see only solution content specific and relevant to their locations.
- **Employee Location** – Ensures that employees (for HelpDesk and HelpDesk for HR applications) see solution content that is specific and relevant to their employee locations.
- **Customer Region** – Ensures that agents and customers (for the Support applications) see solution content that is specific and relevant to the customers’ regions.

### Automatic Case Creation from Inbound Emails

PeopleSoft Multichannel Communications eMail Response Management System (ERMS) helps contact centers manage large volumes of email inquiries, providing the tools to respond quickly and accurately with the right resolution. ERMS integrates with the Support Case Management process of the PeopleSoft Support applications.

To enforce the procedures and processes implemented in the case management system when agents are interacting with customers who submit inquiries via an email channel, the ERMS system can be configured to create a new case automatically.

### Service Reporting and Analytics

PeopleSoft Support includes a set of operational reports to help customer support managers monitor and maximize the efficiency of their contact center operations. In addition to operational reports, PeopleSoft CRM offers a
number of optional analytics tools for measuring performance and ensuring that organizational objectives are being met.

The Manager Dashboard includes these analysis pagelets:

- Cases at Risk of Exceeding SLA (Service Level Agreement)
- Manager Case Backlog
- Case Arrivals versus Closures
- Top Solutions by Library and by Category
- Top Solutions by Product

The Agent Dashboard includes these analysis pagelets:

- My Case Backlog
- My Open Case SLA Status
- Agent – My Cases
- Top Solutions by Library
- Top Solutions by Category
- Top Solutions by Product

CONTACT US
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