PEOPLESOFT HELPDESK FOR HUMAN RESOURCES

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Today's Human Resource organizations are faced with the challenge of providing rapid and high quality customer service to their workforce while containing or reducing costs. Administrative staff reductions and hiring freezes contribute to this challenge. Additionally, HR staff is faced with managing spikes in call volume while still providing accurate, consistent solutions and guidance to employees across the entire organization. HR service delivery can be inherently inefficient without smart call routing, intuitive case management, balanced agent workload and effective self-service options.

To help meet these challenges, you may already provide HR self-service and portal content to your workforce, but offering these self-service channels alone is not enough to achieve measurable cost savings – particularly if you service a diversified, growing, multinational, or restructuring workforce. HR organizations worldwide have deployed PeopleSoft HR HelpDesk to streamline their HR service delivery from Request-to-Resolve, allowing their administrative staff to focus on strategic business initiatives and high-touch HR issues.

Service Delivery Best Practices

Service center best practices across all industries dictate that a case be created for every inquiry that is handled by an agent, regardless of how routine the question or issue may be. PeopleSoft HR HelpDesk delivers complete case management capabilities, enabling HR organizations to capture and categorize employee inquiries, analyze case trends, and guide staff through case management best practices. With PeopleSoft HR HelpDesk, you will deliver to your workforce a centralized knowledgebase integrated with case management to enable information sharing across HR for consistent and quick resolution of employee inquiries.

Increase Adoption of Lower Cost Service Channels

Employees expect to have technology-based options for finding solutions to their HR issues and questions. Some prefer to use self-service or a knowledgebase to search for the solution themselves at anytime while others prefer speaking directly to an HR representative.

HR HELPDESK

KEY FEATURES

- Self service solution search with knowledgebase content management
- Employee 360° view using secure, real-time integration with PeopleSoft Human Resources and Oracle e-Business Suite Human Resources
- Seamless user experience across PeopleSoft HR HelpDesk and HCM applications
- Secure direct view-and-edit accessibility to HCM data and applications
- Support for multichannel engagement with HR
- Secure case management for sensitive employee relations issues

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- Effectively manage and automate a comprehensive internal HR support organization
- Lower the overall cost of your HR service delivery while improving your internal service level response
- Maximize lower cost channels for servicing your workforce
- Empower your HR professionals with tools to resolve common inquiries and problems consistently
- Apply service delivery best practices to manage HR case volume
- Management insight into case volume and root causes
- Identify policies that require workforce communications or training
- Assess HR policy effectiveness and compliance
- Reduce organizational risk and liability with sensitive employee relations issues

PeopleSoft HR HelpDesk enables your HR organization to provide a variety of channels that employees may leverage to engage HR. Deploying lower cost channels like self-service, chat and email to make it simple and convenient for employees to find the information they are looking for, through a consistent employee service experience.

Employee Self Service

Many employees today are resourceful and accustomed to using search and self service application tools to find answers to issues on their own. PeopleSoft HR HelpDesk's configurable Employee Self Service Homepage is the launching point for your employees to find solutions and related information, create cases, interact with HR agents and access HR transactions as needed.

HR HelpDesk Employee Self Service Homepage

The Employee Self Service Homepage leverages configurable dashboard functionality consistent across all PeopleSoft products. Each section – or pagelet – is configurable and makes it simple for employees to personalize and highlight what is most important to them.

- *Quick Links* allow easy access to frequently used information or actions

- *HR Shortcuts* link to HR applications or other relevant systems

- *Top Solutions* lists top solutions as defined and configured by your HR staff

- *FAQ* offers a predefined, configurable list of Frequently Asked Questions that include historical information gathered from other cases with similar content

- *Known Issues* display a predefined, configurable list of global cases

- *My Recent Cases* lists all the employee's recently-logged cases for quick reference

- *Search Here for Answers* provides powerful search capabilities leveraging Oracle's Secure Enterprise Search technology that features a keyword search for navigating content in solutions, FAQs, cases, known issues and troubleshooting guides

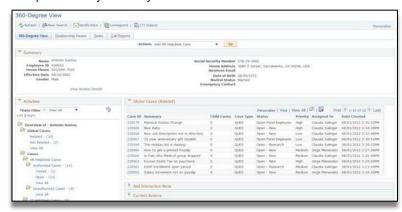## Configurable Knowledgebase Content

The knowledgebase content accessible by your employees through self service can either be created by your HR organization or leverage content that already exists such as posted company policies and procedures. Your HR Administrators can develop rich text content with relevant links to HR self-service pages. Knowledgebase content can be segmented and secured based on configurable criteria. As a practical example, the knowledgebase content is easily configured so that an employee in Germany searching for benefits enrollment information does not have to sift through US-based benefits content. An employee's work site, home location, and/or role with the organization are prime candidates for segmenting knowledgebase content to produce faster and more refined self-service search results.
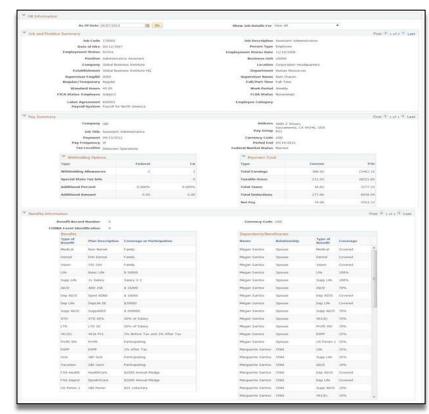
Efficiency through Integration

The PeopleSoft HR HelpDesk provides a tightly integrated solution with both PeopleSoft HR and Oracle e-Business Suite HR. This out-of-the-box integration enables a real time Employee 360° View for agents fielding employee inquiries, action links to navigate seamlessly between your HR system of record and HR HelpDesk, and auto case creation to track an HR action that originated in PeopleSoft HR from request-to-resolve.

360° View

About two-thirds of help desk calls fall into the category of employee data verification (i.e., How much is the contribution to my 401k?, What is my tax withholdings?, etc.). The quickest resolution for these types of data verification questions is the PeopleSoft HR HelpDesk 360° View, which provides the HR agent a complete view of an employee's current HR, Payroll, Absence and Benefits information. From this real time view, your agents can also perform HR HelpDesk functions, such as create a case, view open cases and view case history for the employee. With a combined view of HR and HelpDesk – all in one page, the need to hunt through multiple transaction pages within HelpDesk or in your HR system is eliminated.

360° View – HR Agent Case Management & History

360° View – Real-time Job, Pay, and Benefits directly from your HR system

360° View – Direct Reports for Managers

Action Links

Through the use of delivered integrated Action Links, PeopleSoft HR HelpDesk makes it simple for authorized HR agents to access the PeopleSoft HR or e-Business Suite HR system of record to make necessary updates or retrieve additional
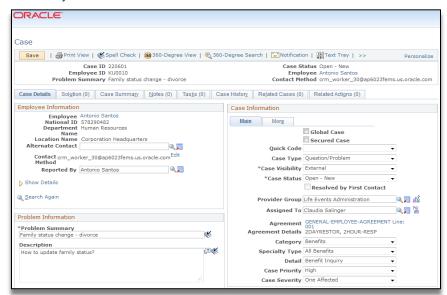

information. Action Links are predefined drop-down lists of commonly accessed HR content – organized by category – related to Benefits, Payroll, Stock, Learning Management, amongst others. With just two clicks, your HR agents are directly logged into the HR application with single sign-on and taken directly to the record of the employee they are assisting. Application security controls and user authentication manage access to any HR pages.

Automatic Case Creation

You can easily configure PeopleSoft HR HelpDesk to automatically create an HR case whenever a specific action is triggered in PeopleSoft HCM Employee Self-Service or PeopleSoft HCM Manager Self-Service. HCM actions typically require review by multiple people or groups before they are completed. Changes to employee personal data, payroll, compensation, benefits, leave requests, and learning and development are just a few examples of HR actions that benefit from having an associated case for tracking and reporting purposes.

Empower HR Agents

You may employ best practices by guiding HR agents through the steps or tasks they need to follow based on the type of HR service inquiry. For simpler inquiries, PeopleSoft HR HelpDesk recommends solutions to resolve the inquiry, whether to view a specific solution in the knowledgebase or use an action link to access a specific page in the HR system.

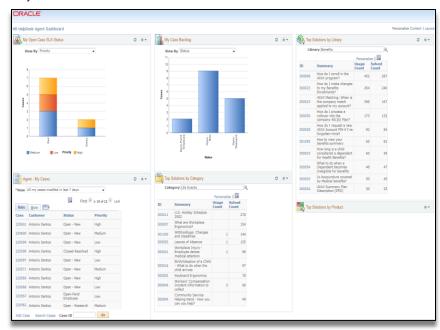All case management activities accessible on one page

For more complex processes where there may be multiple steps that need to be carried out by many individuals or other groups over time, Task Management capabilities can be used to orchestrate that process. Tasks are automatically generated and assigned based on the type of inquiry and automated workflow is used to alert assignees to tasks assigned to them.

PeopleSoft HR HelpDesk provides comprehensive and fully configurable workflow management, with an alert and notification engine that keeps case resolution on track. Agents and management can be alerted when cases are reassigned, if a service level agreement commitment is at risk, or when escalation is required. Service Level Agreements are another important component to best practices, ensuring timely response to inquiries, adherence to commitments and identification of SLA bottlenecks. The workflow engine also keeps employees in the loop with email notifications regarding case updates and case closure email with case solution information.

To further improve HR agent productivity, PeopleSoft HR HelpDesk delivers a framework that simplifies the handling of global issues that affect many employees. For example, in a scenario when a payroll error results in inaccurate employee paychecks, an influx of inquiries could result and overwhelm HR staff. With the global issue alerting framework staff is alerted to global issues and can quickly associate new inquiries to the master global case. When the global case is resolved, all related cases for all impacted employees will be automatically closed and the impacted employees emailed with the resolution.

HR Agent & Manager Dashboard

PeopleSoft HR HelpDesk provides a one-stop dashboard for HR Agents and HR Managers. The dashboards provide visibility into open cases, priorities, and status. A listing of top priority cases, top solutions, and cases at risk of exceeding SLAs, backlog cases and case closure rates are shown with access to case details just one click away.

HR Agent Dashboard

Multi-Channel Engagement with HR

PeopleSoft HR HelpDesk provides a variety of live and offline channels for your workforce to engage with HR when direct interaction is required for complex issues. When live interaction is preferred or required, the phone and chat channels are made available. Computer Telephony Integration (CTI) provides your workforce with an interactive phone experience, where the agent receives an automated screen pop of the employee's key information as they engage the employee. An employee can initiate a chat interaction with HR through any self-service page for real-time issue resolution and collaboration.

The chat functionality is part of the Multichannel Communications solution and is fully integrated to PeopleSoft HR HelpDesk, enabling agents to create cases from the chat user interface and for the chat history to be saved as part of the interaction and case history.

To contact HR offline, your workforce can send email or create a case through self-service. The email response management system (ERMS) is part of the Multichannel Communications solution. Automation streamlines the ERMS process, enabling intelligent auto-responses with answers to employee questions and/or the automatic creation of a case.

Consistent Service Experience across Channels

Your employees expect a consistent service experience regardless of which channel they use to engage HR. In PeopleSoft HR HelpDesk, all channels route inquiries based on the type of issue, ensuring that it will be routed to the right person the first time. When the channel interaction results in a case being created, a service level agreement is assigned and enforced with a commitment to employees for response and resolution. Competency and skill based assignment of cases is used to ensure that the agent is qualified to respond to the inquiry.

Secure Case Management

PeopleSoft HR HelpDesk enables your HR organization to securely track and handle the most sensitive of HR employee relations issues while protecting the privacy of sensitive employee information, reducing liability, and ensuring HIPAA compliance. Those features include:

- *Caller Verification and Validation* for HR agents to verify callers by leveraging workforce personal profile information populated on the Employee 360° View page. This provides the information needed to validate the caller's identity before collecting sensitive HR data.

- *Case Security* for cases that contain sensitive information. HR agents can mark the case as "secured" which limits access and visibility to that case to only the group or individual assigned to the case.

- *Case Visibility* for configuring whether case details are for external or internal viewing only

- *Grievance Support* for HR agents to identify the employee that is reporting the issue and who it is being reported against. Application security ensures that the person against whom the case is being reported cannot access the case in self-service and the case does not appear in that person's 360° View.

- *Single Sign-On* for HR agents to have immediate access to the PeopleSoft HR HelpDesk, PeopleSoft HR, e-Business Suite HR and 3rd party systems.

This comprehensive case management functionality supports your need for longer term management and resolution often associated with complex or sensitive issues. Notes and attachments functionality keep a complete history of all interactions.

Auditing

The hierarchal case management design provides the ability to associate other related incidents to a case. Changes to the case, like assignment changes, addition of notes and any other field changes, are tracked in the case history along with who made the change, the values before and after, and when the changes were made. This auditing and history tracking ensures accountability throughout the process and reduces broader organizational risk.

CONTACT US

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