

CLONING A WORKER'S EXISTING CASE

This job aid will serve as a guide on how to clone a worker's existing case in PeopleSoft CRM 9.0.

The **Clone Case** feature allows quick creation of a new case from an existing case and copies all information, including the worker information. Use these steps to quickly establish a new case for a worker from an existing case. This feature is useful when the current problem is the same or similar to a previous case and can be used whenever you would like most of the information cloned. *Keep in mind that a notification will be sent immediately upon the clone to the workers name who appears when the case is cloned.*



Before beginning the steps below, navigate to <https://myohio.oaks.ohio.gov> and log in with OAKS User ID and password.



Have the existing case number ready.

Step-by-Step	Screen
1. Click Launch Application link in the Customer Relationship Mgmt. row in the OAKS Quick Access section	

The OAKS Customer Relationship Management (CRM) screen will appear.

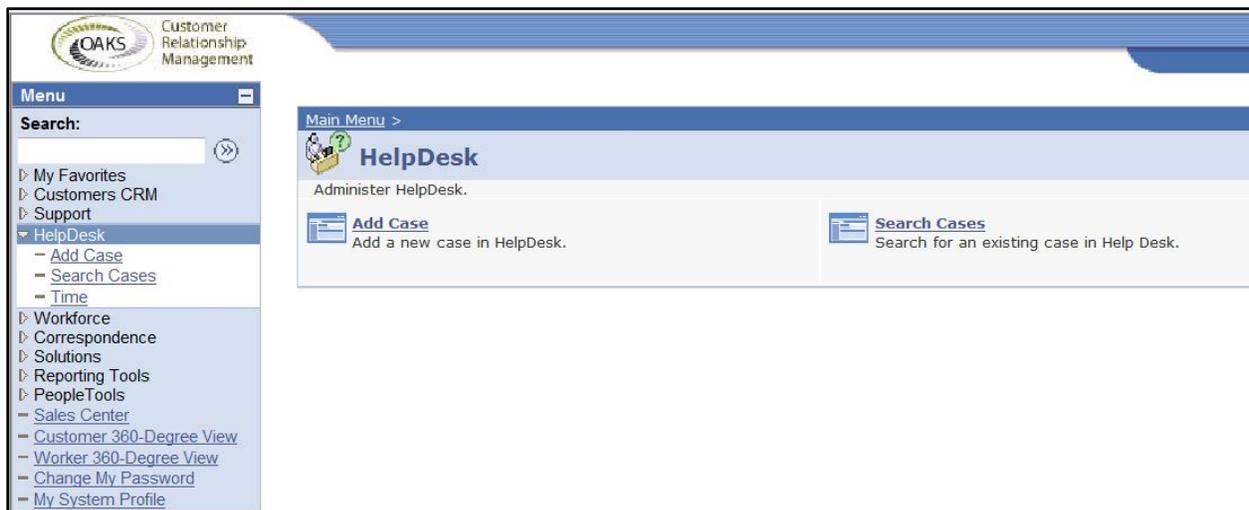


CLONING A WORKER'S EXISTING CASE

Step-by-Step for Cloning a Worker's Existing Case

Step-by-Step	Screen
2. Click on HelpDesk .	 <p>The screenshot shows a 'Menu' window with a search bar and a list of items. The 'HelpDesk' item is highlighted with a red box. The items in the menu are: My Favorites, Customers CRM, Orders and Quotes, Support, HelpDesk, Workforce, Correspondence, Solutions, Reporting Tools, PeopleTools, Sales Center, Customer 360-Degree View, Worker 360-Degree View, Change My Password, and My System Profile.</p>

The HelpDesk page is displayed.



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3. Click on the [Search Cases](#) link.



4. Enter the existing **Case** number or **Employee ID, Employee**, etc.
5. Click **Search**.

A screenshot of a search criteria form. The form contains several fields with dropdown menus and search icons. The fields are: "*Business Unit" (set to "Ohio"), "Case", "SMS/ITSM" (set to "begins with"), "Employee ID", "Employee" (set to "ROBERT COOPERMAN"), "Work Order ID", "Work Order Description" (set to "begins with"), "Case Status", "Case Priority", "Problem Type", "Assigned To", and "Provider Group". A red rectangular box highlights the entire search criteria section. Below the form are two buttons: "Search" (highlighted with a red box) and "Clear". At the bottom right, there are links for "Advanced Search", "Save Search Criteria", and "Delete".

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- Look under **Summary** and see if there is a similar or same case problem.
- Click on the **Case** number that best fits the information you would like to have cloned.

Help Desk Case

Search Results

Case	Employee Name	Summary	Status	Assigned To
308084	ROBERT COOPERMAN	Modify Voucher	Open - In Progress	ROBERT COOPERMAN
308055	ROBERT COOPERMAN	Would like to schedule a lab.	Open - In Progress	DEREK BRIDGES
308049	ROBERT COOPERMAN	Would like to schedule a lab.	Open - In Progress	DEREK BRIDGES
307996	ROBERT COOPERMAN	Modify Voucher	Closed - Resolved	ROBERT COOPERMAN

The **Case** page displays with the **Case ID** number that will be cloned.

Case 12/13/2011 12:13:22PM EST

Save | Print | Spell Check | 360 360-Degree View | Notification | **Clone Case** >> | Personalize

Case ID 488764
Employee ID 10001037
Summary ELM - Forms

Status Closed - Resolved
Employee Name ROBERT COOPERMAN
Contact Method 001-614/644-1825

Case | Solution (1) | Notes (0) | Case History | Related Cases (0)

Employee Information

Employee ROBERT COOPERMAN
Department Budget Devel & Implement Svcs
Contact Method 001-614/644-1825 Edit
Email Robert.Cooperman@obm.state.oh.us.QA

Search Again

Inquiry Information

Inquiry Summary
ELM - Forms

Description
Process attached forms

Mary Bertke, ID# 10113853, needs to be disabled from ELM (she has the agency administrator role and is part of the OBM learning environment). I have attached the ELM Security Form with her information.

Case Information

Main | Dev/Tech

Business Unit OSS1
Quick Code
Case Type Normal
Case Status Closed - Resolved
 Resolved by First Contact

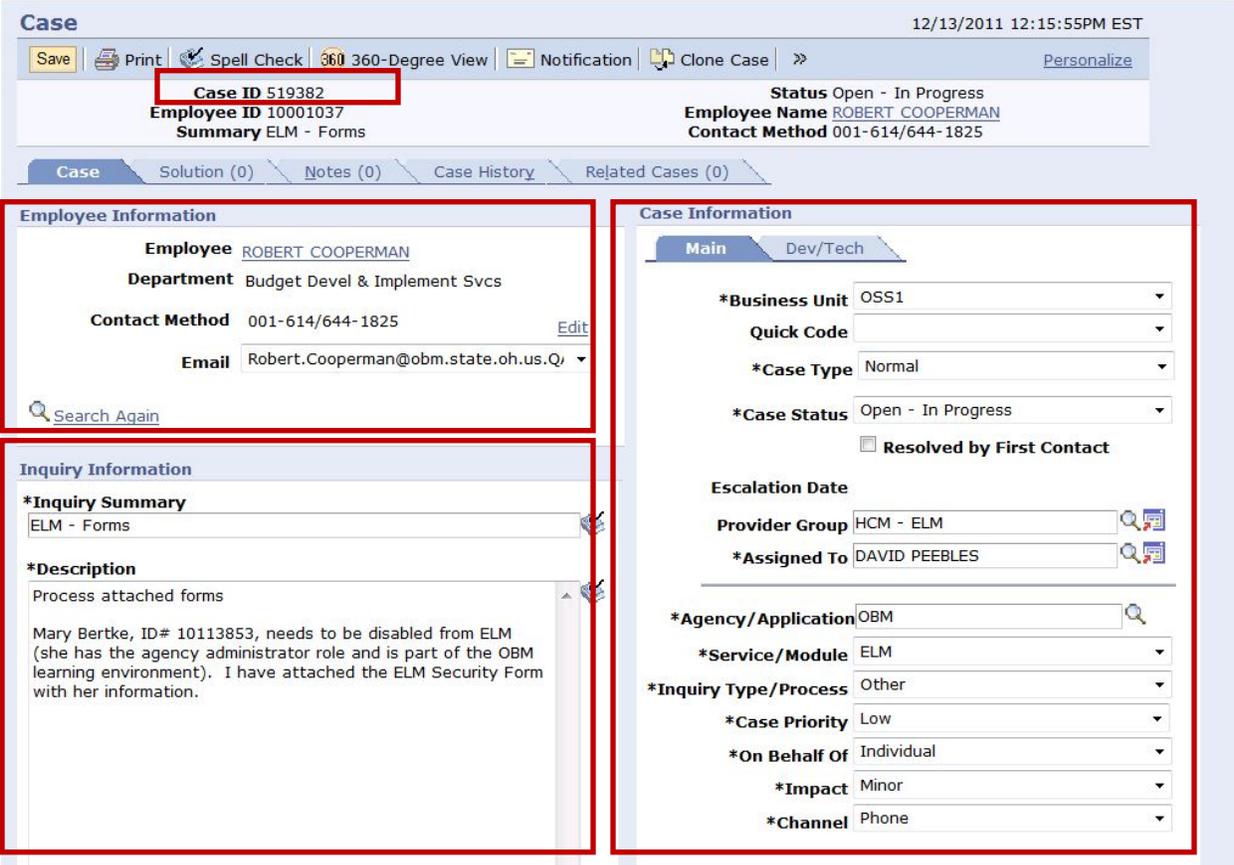
Escalation Date
Provider Group HCM - ELM
***Assigned To** DAVID PEEBLES

***Agency/Application** OBM
Service/Module ELM
Inquiry Type/Process Other
Case Priority Low
On Behalf Of Individual
Impact Minor
Channel Phone

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<p>8. Click on the Clone Case icon.</p>	
<p>9. Click OK to verify the case was cloned, noting the case numbers.</p>	

A new **Case** page window opens. All the original information has been cloned to a new **Case ID**.



Case 12/13/2011 12:15:55PM EST

Save Print Spell Check 360 360-Degree View Notification Clone Case Personalize

Case ID 519382 **Status** Open - In Progress
Employee ID 10001037 **Employee Name** ROBERT COOPERMAN
Summary ELM - Forms **Contact Method** 001-614/644-1825

Case Solution (0) Notes (0) Case History Related Cases (0)

Employee Information

Employee ROBERT COOPERMAN
Department Budget Devel & Implement Svcs
Contact Method 001-614/644-1825 [Edit](#)
Email Robert.Cooperman@obm.state.oh.us.Q

[Search Again](#)

Inquiry Information

***Inquiry Summary**
 ELM - Forms

***Description**
 Process attached forms
 Mary Bertke, ID# 10113853, needs to be disabled from ELM (she has the agency administrator role and is part of the OBM learning environment). I have attached the ELM Security Form with her information.

Case Information

Main Dev/Tech

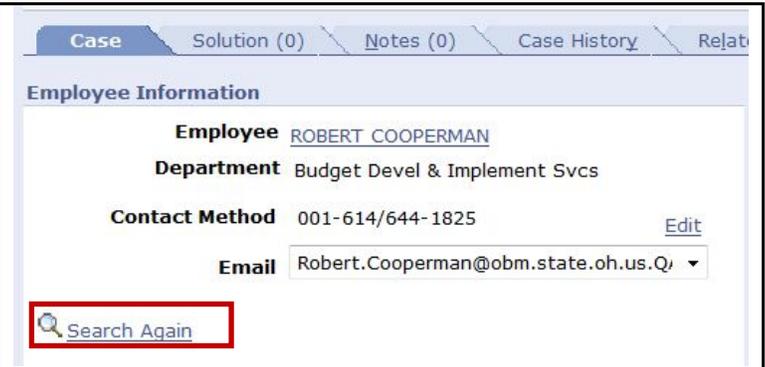
***Business Unit** OSS1
Quick Code
***Case Type** Normal
***Case Status** Open - In Progress
 Resolved by First Contact

Escalation Date
Provider Group HCM - ELM
***Assigned To** DAVID PEEBLES

***Agency/Application** OBM
***Service/Module** ELM
***Inquiry Type/Process** Other
***Case Priority** Low
***On Behalf Of** Individual
***Impact** Minor
***Channel** Phone

CLONING A WORKER'S EXISTING CASE

10. Click on **Search Again** to assign the cloned case to a different worker.



Case Solution (0) Notes (0) Case History Relat

Employee Information

Employee ROBERT COOPERMAN

Department Budget Devel & Implement Svcs

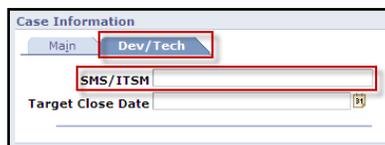
Contact Method 001-614/644-1825 [Edit](#)

Email Robert.Cooperman@obm.state.oh.us.Q

[Search Again](#)



The only field NOT cloned will be the **SMS/ITSM** field on the **Dev/Tech** tab. This field is used by Tier 3 only.



Case Information

Main Dev/Tech

SMS/ITSM

Target Close Date

CLONING A WORKER'S EXISTING CASE

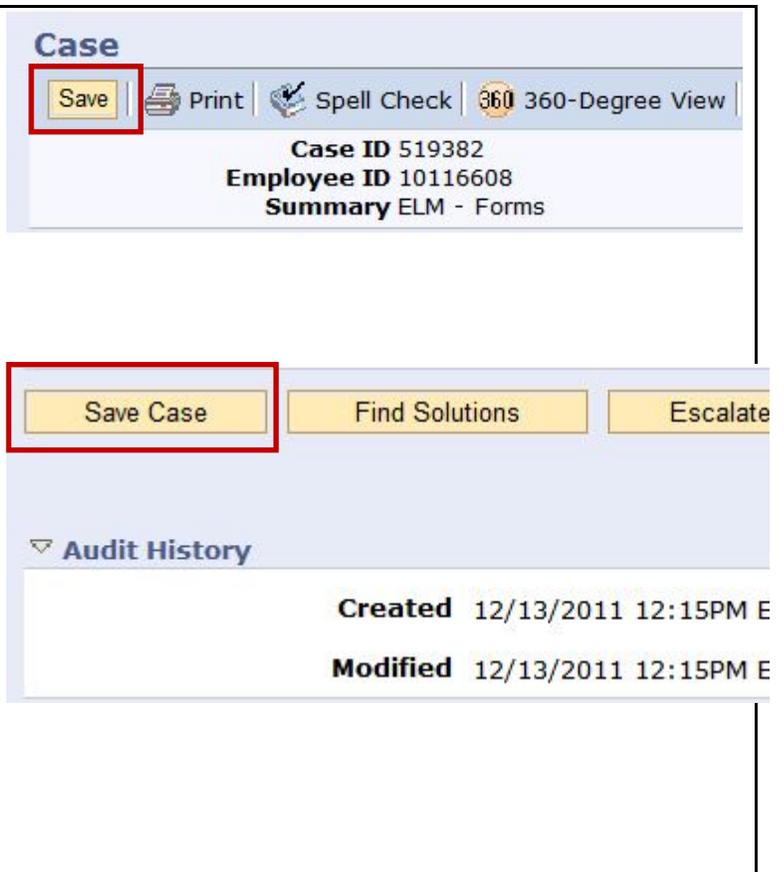
<p>11. Enter as much information about the new worker as possible.</p> <p>12. Click Search.</p>	<p>Search For Employee</p> <p>Search</p> <p>Employee ID = []</p> <p>First Name begins with [Felicia]</p> <p>Last Name begins with [Shanklin]</p> <p>Department Name = []</p> <p>Location Name = []</p> <p>Physical Location = []</p> <p>Phone begins with []</p> <p>Email = []</p> <p>Search Clear Cancel</p>								
<p>13. Click on the Last Name or First Name link.</p>	<p>Create Worker</p> <p>Search Results</p> <table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Employee ID</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>SHANKLIN</td> <td>FELICIA</td> <td>10116608</td> <td>Budget Devel & Implement Svcs</td> </tr> </tbody> </table>	Last Name	First Name	Employee ID	Department	SHANKLIN	FELICIA	10116608	Budget Devel & Implement Svcs
Last Name	First Name	Employee ID	Department						
SHANKLIN	FELICIA	10116608	Budget Devel & Implement Svcs						
<p>The Employee Information fields now reflect the new employee information.</p>	<p>Case Solution (0) Notes (0) Case History Related</p> <p>Employee Information</p> <p>Employee FELICIA SHANKLIN</p> <p>Department Budget Devel & Implement Svcs</p> <p>Contact Method 614/836-4665 Edit</p> <p>Email Felicia.Shanklin@obm.state.oh.us.QA</p> <p>Search Again</p>								
<p>14. Enter any other dissimilar information as needed into the Inquiry and/or Case Information sections of the Case page.</p>	<p>Case Solution (0) Notes (0) Case History Related Cases (0)</p> <p>Employee Information</p> <p>Employee FELICIA SHANKLIN</p> <p>Department Budget Devel & Implement Svcs</p> <p>Contact Method 614/836-4665 Edit</p> <p>Email Felicia.Shanklin@obm.state.oh.us.QA</p> <p>Search Again</p> <p>Inquiry Information</p> <p>*Inquiry Summary ELM - Forms</p> <p>*Description Process attached forms Mary Bertke, ID# 10113853, needs to be disabled from ELM (she has the agency administrator role and is part of the OBM learning environment). I have attached the ELM Security Form with her information.</p> <p>Case Information</p> <p>Main Dev/Tech</p> <p>*Business Unit OSS1</p> <p>*Quick Code</p> <p>*Case Type Normal</p> <p>*Case Status Open - In Progress</p> <p><input type="checkbox"/> Resolved by First Contact</p> <p>Escalation Date</p> <p>Provider Group HCM - ELM</p> <p>*Assigned To DAVID PEEBLES</p> <p>*Agency/Application OBM</p> <p>*Service/Module ELM</p> <p>*Inquiry Type/Process Other</p> <p>*Case Priority Low</p> <p>*On Behalf Of Individual</p> <p>*Impact Minor</p> <p>*Channel Phone</p>								

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15. Click **Save**.



Clicking **Save Case** at the bottom of the **Case** page performs the same function.



The screenshot shows the 'Case' page interface. At the top, there is a header bar with the title 'Case' and a navigation menu containing 'Save', 'Print', 'Spell Check', and '360 360-Degree View'. Below the header, the case details are displayed: 'Case ID 519382', 'Employee ID 10116608', and 'Summary ELM - Forms'. In the middle section, there are three buttons: 'Save Case', 'Find Solutions', and 'Escalate'. The 'Save Case' button is highlighted with a red box. Below the buttons is an 'Audit History' section with a dropdown arrow. The audit history table shows two entries: 'Created 12/13/2011 12:15PM E' and 'Modified 12/13/2011 12:15PM E'.