

# CREATING A CASE FOR A WORKER

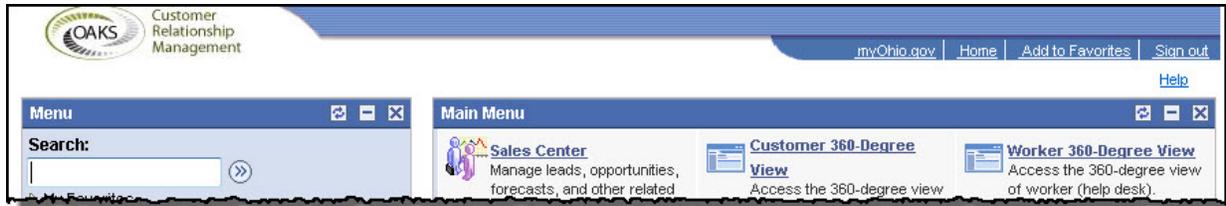
This job aid will serve as a guide to creating a case for a worker in PeopleSoft CRM 9.0.



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

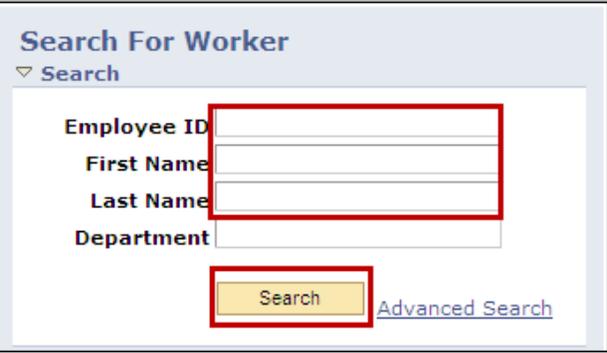
Step-by-Step	Screen
1. Click <b>Launch Application</b> link in the <b>Customer Relations Management</b> row in the <b>OAKS Quick Access</b> section	 <p>OAKS Quick Access</p> <ul style="list-style-type: none"><li>Business Intelligence<ul style="list-style-type: none"><li>BI Home</li></ul></li><li>Customer Relations Management<ul style="list-style-type: none"><li>CRM Home</li><li><b>Launch Application</b></li></ul></li></ul>

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



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## Step-by-Step for Creating A Case for a Worker.

Step-by-Step	Screen
2. Click on the <a href="#">Worker 360-Degree View</a> link.	 A screenshot of a web application menu. At the top is a search bar with a magnifying glass icon. Below it is a list of menu items: 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 (highlighted with a red box), Change My Password, and My System Profile.
3. Enter search criteria in the <b>Employee ID, First Name and/or Last Name</b> boxes.  4. Click <b>Search</b> .	 A screenshot of the 'Search For Worker' form. It has a title 'Search For Worker' and a dropdown menu set to 'Search'. Below the title are four input fields: 'Employee ID', 'First Name', 'Last Name', and 'Department'. The 'Employee ID', 'First Name', and 'Last Name' fields are grouped together and highlighted with a red box. Below the input fields is a yellow 'Search' button, also highlighted with a red box, and a blue link for 'Advanced Search'.

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The **360 Degree View** page is displayed.

**360-Degree View** 08/23/2010 8:17:34AM EDT

Refresh | New Search | Notification | Correspond | Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

\*Role Worker | Actions Add IT Helpdesk Case | Go

**Summary**

First Name ROBERT | Last Name COOPERMAN  
Employee ID | Location  
Status Active | Effective Date 10/11/2009

[View Worker Details](#)

**Activities**

\*Date Filter 5 - Last Month | First | Previous | Next | Last | Left | Right

Overview of - ROBERT COOPERMAN

- IT Helpdesk Cases - (2)
  - Closed - (1)
  - Open - (1)
  - [View All](#)
  - [Add IT Case](#)
  - [Search IT Cases](#)
- Interactions - (5)

**IT Helpdesk Cases**

Show All Columns | Find | View All | First | 1-2 of 2 | Last

Case ID	Summary	Assigned To	Status
308049	Would like to schedule a lab.	GAIL NEFF	Open - In Progress
307996	Modify Voucher	ROBERT COOPERMAN	Closed - Resolved

[Add Interaction Note](#)

[Current Actions](#)

5. Review the existing cases to ensure there is not already a case open for the issue. If there is click on the applicable case number in the **Case ID** field. If not skip to step 6.

**IT Helpdesk Cases**

Show All Columns | Find | View All | First | 1-2 of 2 | Last

Case ID	Summary	Assigned To	Status
308049	Would like to schedule a lab.	GAIL NEFF	Open - In Progress
307996	Modify Voucher	ROBERT COOPERMAN	Closed - Resolved

[Add Interaction Note](#)

[Current Actions](#)

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6. Click **Go** for **Add IT Helpdesk Case** in the **Actions** field.



The **360-Degree View** page will show any previous **IT HelpDesk Cases** for the worker.

The screenshot shows the 'Actions' dropdown menu with 'Add IT Helpdesk Case' selected and a 'Go' button. Below it, the employee's details are displayed: Last Name: COOPERMAN, Location, and Effective Date: 10/11/2009. A table titled 'IT Helpdesk Cases' is shown with the following data:

Case ID	Summary	Assigned To	Status
308049	Would like to schedule a lab.	GAIL NEFF	Open - In Progress
307996	Modify Voucher	ROBERT COOPERMAN	Closed - Resolved

Below the table are links for 'Add Interaction Note' and 'Current Actions'.

The **Case** page displays auto-filled with some of the employee and case information.

The screenshot shows the 'Case' page for Case ID 519371. The page is auto-filled with the following information:

- Employee Information:** Employee: ROBERT COOPERMAN, Department: Budget Devel & Implement Svcs, Contact Method: 001-614/644-1825, Email: Robert.Cooperman@obm.state.oh.us.Q
- Case Information:** Status: Open - In Progress, Employee Name: ROBERT COOPERMAN, Contact Method: 001-614/644-1825
- Case Details:** Business Unit: OSS1, Quick Code, Case Type: Normal, Case Status: Open - In Progress, Resolved by First Contact (unchecked), Escalation Date, Provider Group, Assigned To, Agency/Application, Service/Module, Inquiry Type/Process, Case Priority: Medium, On Behalf Of, Impact: Minor, Channel: Phone

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7. If applicable use the drop-down arrow to the right of the **Quick Code** field to choose a department/problem that best identifies the case.

The screenshot shows the 'Case Information' form with the following fields and values:

- \*Business Unit: OSS1
- Quick Code**: (highlighted with a red box)
- \*Case Type: Normal
- \*Case Status: Open - In Progress
- Resolved by First Contact
- Escalation Date: (empty)
- \*Provider Group: (empty)
- \*Assigned To: (empty)
- \*Agency/Application: (empty)
- \*Service/Module: (empty)
- \*Inquiry Type/Process: (empty)
- \*Case Priority: Medium
- \*On Behalf Of: (empty)
- \*Impact: Minor
- \*Channel: Phone

Choosing a **Quick Code** auto-fills various fields.

8. Manually add information to the remaining required (\*) fields.

The screenshot shows the 'Case Information' form with the following fields and values:

- \*Business Unit: OSS1
- Quick Code: HCM - Payroll Garnishments
- \*Case Type: Normal
- \*Case Status: Open - In Progress
- Resolved by First Contact
- Escalation Date: (empty)
- Provider Group: (empty)
- \*Assigned To: (empty)
- \*Agency/Application: OAKS HCM
- \*Service/Module: Payroll
- \*Inquiry Type/Process: Garnishments
- \*Case Priority: (empty)
- \*On Behalf Of: (empty)
- \*Impact: Minor
- \*Channel: Phone

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9. Manually add information to the **Inquiry Summary** and **Description** fields. Add as much information as possible to give a clear idea of the case. Any required fields that were “missed” will be highlighted. The required fields must be filled in before the case can be saved.

10. Click **Save Case**.

The screenshot displays a web-based form titled "Inquiry Information". It contains two main sections: "\*Inquiry Summary" and "\*Description".

- The "\*Inquiry Summary" section has a text input field containing "HCM - Payroll Garnishments".
- The "\*Description" section is highlighted with a red border and contains the following fields:
  - Agency Name:
  - Employee Name:
  - Employee ID:
  - Contact Info:

At the bottom of the form, there are three buttons: "Save Case", "Find Solutions", and "Escalate Case". The "Save Case" button is highlighted with a red border.