

CUSTOMER QUICK REFERENCE GUIDE FOR PEOPLESOFT ENTERPRISE CUSTOMERS

Support Services Overview

We never stop—because your business never stands still.

PeopleSoft Support Services never stops ensuring the success of your PeopleSoft systems, and your business. We deliver the industry's most comprehensive support programs—offering you:

- **Continuous software enhancements**—You receive the rights to future software releases including the latest technologies, industry best practices, and new product features.
- **24x7 real-time support**—You have access to in-depth technical knowledge and assistance through the support services online portal, My Customer Connection, and the award-winning call center, PeopleSoft Global Support Center.
- **Indefinite technical support**—You receive technical support from our Global Support Center and online self-service tools for as long as you license your software.
- **Intelligent support technologies**—Benefit from sophisticated support technologies that automate the labor-intensive processes normally required to maintain enterprise software.

This quick reference guide will help you find the answers you need—when you need them.

Important PeopleSoft Support Services Phone Numbers

Region	Call
North America	800 477 5738 (Business hours 4 a.m. to 6 p.m. Pacific Time)
Asia Pacific	Singapore: 65 832 2144 (Business hours 9 a.m. to 6 p.m. Local Time) Sydney: 61 2 9413 0140 (Business hours 9 a.m. to 6 p.m. Local Time) Tokyo: 81 3 5432 7681 (Business hours 9 a.m. to 5 p.m. Local Time)
EMEA	Amsterdam: 31 20 462 5555 (Business hours 9 a.m. to 6 p.m. Local Time)
Latin America	Brazil: 55 11 5189 9100 (Business hours 9 a.m. to 6 p.m. Local Time)
PeopleSoft Customer Care	
North America	800 477 5738, Option #2
Support Sales	800 477 5738, Option #4
PeopleSoft Education	877 270 2444

Refer to the Global Support Center and Customer Care directories on Customer Connection for a comprehensive listing of country-specific telephone numbers. These directories can be found at www.peoplesoft.com/goto/globalsupportcenter and www.peoplesoft.com/goto/customer-care, respectively.

Top 10 PeopleSoft Support Services Web Links on Customer Connection

1. **Site Index.** A useful map with links to all PeopleSoft services on Customer Connection.
Navigation: Site Index
2. **Updates + Fixes.** Download fixes, translations, regulatory updates, PeopleTools patches, application bundles, and fix packs.
Navigation: Updates + Fixes
3. **Log a Case/Online Support.** Create and manage cases, search for solutions, review and update your company information.
Navigation: Support > Online Support
4. **Support Troubleshooting.** Find articles in our Tips and Techniques section and consult our Problem Resolution Guide for a roadmap to handling specific support issues.
Navigation: Support > Troubleshooting
5. **Product Roadmaps + Schedules.** Jump-start your release planning with summary views of all PeopleSoft releases.
Navigation: Support > Roadmaps + Schedules
6. **User Manuals and System Documentation.** Get upgrade documentation and scripts, order PeopleBooks, and find business-process maps.
Navigation: Support > Documentation
7. **Implementation, Optimization, and Upgrade Guides.** These guides help you understand the tools, services, and documentation that you can use to maximize your PeopleSoft investment.
Navigation: Implement, Optimize + Upgrade
8. **PeopleSoft Advisor.** The PeopleSoft Advisor program is a series of webcasts created to give you advice on product, technical, and service topics. All sessions are recorded for playback at your convenience.
Navigation: Find What You Need > Advisor Webcasts
9. **PeopleSoft Plugged In.** Our automated email service pushes the latest PeopleSoft news directly to your in-box. You can subscribe to various PeopleSoft Plugged In newsletters depending on your roles and interests.
Navigation: News + Events > Plugged In Archive
10. **Support Policy.** Our industry-leading support policy includes information about release support, retirement, upgrade paths, and maintenance.
Navigation: Support > Support Policy

Essential Resources

The Global Support Center

The PeopleSoft Global Support Center provides follow-the-sun support for your mission-critical issues. Anywhere or anytime, our real-time support specialists in Global Support Center hubs located in Pleasanton, Denver, Sydney, Amsterdam, Vancouver, and São Paulo ensure that your issues get resolved to your satisfaction.

You can also search, diagnose, and resolve issues 24x7 using self-service tools on PeopleSoft Customer Connection. If you need to contact the Global Support Center directly, see the appropriate telephone numbers at the beginning of this guide.

My Customer Connection

Your single point of entry to PeopleSoft information and support self-service is our comprehensive customer portal, My Customer Connection. Use it to gain instant access to the information you need to resolve software issues quickly and effectively. You can also customize the content and layout to best suit your needs, choosing from the following pagelets currently available:

- **Updates and Fixes Notification**—Get fast access to updates and fixes for products you maintain. You can edit this pagelet to specify product line, product module, release, and time periods for receiving notifications.
- **Recent Cases**—Manage your PeopleSoft online support at a glance. You can see the status of your organization's cases, access online support to create a new case, search solutions, and link to other views. You can customize this pagelet to show the cases most relevant to your role.
- **Product Roadmaps**—Get a personalized view of the PeopleSoft product roadmap by product line. Customize your pagelet to see a list of releases and availability dates.
- **Tax Update Schedule**—View scheduled release dates. You can add and delete updates to personalize your pagelet.
- **Financial Aid Regs Schedule**—Display the most recent and next three updates from the PeopleSoft Financial Aid regulatory release schedule. For each update, your pagelet shows details about the release date, tested PeopleTools versions, and applicable release numbers.
- **Maintenance Schedule**—View the maintenance schedule applicable to your product line, release, and product module. Manage the pagelet to display scheduled application bundles or PeopleTools patches and their release dates.
- **Documentation Updates**—View a list of documentation updates specific to your product line, release, and product module. Select a document title to link directly to the update.
- **Advisor Webcasts**—View a list of PeopleSoft Advisor webcasts for which you've registered, along with links to upcoming sessions. You don't need to edit this pagelet; when you register for a PeopleSoft Advisor session the information is displayed automatically.
- **Company Announcements**—View a list of links to the latest press releases from PeopleSoft or our partners.
- **PeopleSoft in the News**—View a list of links to the most recent news articles about PeopleSoft.

Online Support

To get started, log in to PeopleSoft Customer Connection at www.peoplesoftcustomer.com and navigate to [Support > Online Support](#).

There you can:

- Create new support cases.
- Manage existing cases.
- Search for solutions.
- Review your agreements.
- Manage your installed products.
- Manage your communication preferences and contact information.
- Order software and services.

NOTE: If you are a new customer and need help using Customer Connection, a guide is available online. Navigate to [Customer Connection > Find What You Need > New Customers Start Here](#).

PeopleSoft Customer Care

Customer Care handles all non-technical business issues, connecting customers with PeopleSoft's information and services for inquiries about products, services, training, consulting, guidance and education on self-service tools and programs, support policy, releases, software orders, fiscal and contract issues, and customer launch programs. Also, if you are uncertain whom to contact for your request, Customer Care is happy to assist.

To access Customer Care, go to www.peoplesoft.com/goto/customer_care. If you need a PeopleSoft Customer Connection user name and password, call your local Customer Care using the directory at: www.peoplesoft.com/goto/customer_care.

Working Effectively with PeopleSoft Support Services

Things You Need to Know

Site Identification Number (SIN)

To begin the case resolution process over the phone with the Global Support Center, you'll need to know the appropriate SIN. You can look up the SIN in the Review Your Agreements section of Online Support. You'll find the SIN listed in the Supported Sites box on the Agreement Results page.

Case and Case ID

You can contact PeopleSoft for support online using PeopleSoft Customer Connection or by phone. Once your case is submitted, the support system assigns it a unique case number, which you will use to track your case.

Customer Reference Number

We understand that our customers also track their cases with their organization's support systems and may need to coordinate the PeopleSoft-generated numbers with their own. That's why you can now enter your internal tracking number in the Customer Reference Number field when you're creating a new case. Once the number is entered, you can use it or the PeopleSoft Case ID to review your case status.

Priority Levels

Case priority levels define the degree of impact to your business as a result of a technical issue with a PeopleSoft application. PeopleSoft assigns all cases a priority level, which determines the response time, deployment of resources, and other rules of engagement. PeopleSoft defines priority levels as:

- **Priority 1—Production Critical (P1):** Production is stopped at your site through an error that renders the software inoperative. A P1 issue requires an initial response time of no more than two hours. The issue is closely monitored, and escalated as appropriate, until it is resolved.
- **Priority 2—Production Urgent (P2):** Your business is significantly affected through an error that impacts performance of the software. A P2 issue calls for a response time of less than six hours.
- **Priority 3—Production Standard (P3):** Errors that affect performance of the software but do not degrade your use of it. P3 issues call for a response no later than one business day after they are reported.

Search for Solutions

You can resolve your technical issues quickly by searching our solutions library. On PeopleSoft Customer Connection, navigate to [Support > Online Support > Search for Solutions](#), or add the Recent Cases pagelet to My Customer Connection and access the link from the pagelet on your homepage.

On this page, you can look up previous resolutions that may solve your case by using Keyword Search or Frequently Used Solutions. You can also use Advanced Search to narrow your search criteria.

Logging a Case

Log in at www.peoplesoftcustomer.com and navigate to [Support > Online Support](#). Here you will find a link for creating a case. On the Create Case page, you will need to provide the following information:

- The PeopleSoft product for which you are seeking support.
- Your customer reference number (if any).
- Case type, such as enhancement, incident, installation.
- Priority level (P1, P2, or P3).
- Summary and details.
- Environment information.

After providing this information, you can attach files and screenshots and submit the case. When you log a P1 (Production Critical) case, you must call the Global Support Center afterwards.

Manage Existing Cases

Search for your open case and click on the case number. This will take you to the Manage Case page, where you can:

- See case details and status.
- Provide or update environment information.
- Add notes or attachments.
- Search for solutions.
- View the case history.
- Close the case.

Reporting Technical Incidents to the PeopleSoft Global Support Center

You may report suspected incidents to PeopleSoft by creating a case on the Create Case page on PeopleSoft Customer Connection. The Global Support Center will verify if it is really an incident and then work with you to find a resolution.

Help Speed Up the Global Support Center Resolution Process

Here are some general tips to remember:

- Provide clear and detailed descriptions of problems.
- Note your PeopleTools and application release, as well as the version of any third-party products that are related to your problem.
- Note the name of the PeopleSoft component or page, report, or program that's failing, as well as the navigation path.
- Test the problem in your demo database—if you can duplicate the results, you'll know the problem is caused by something other than a data or customization issue.
- Document specific instructions for replicating the problem.
- Identify the most recent fix, update, or bundle applied to the affected application.
- Determine if anything has changed in your computing environment since the last time the affected application worked successfully.
- Search for existing solutions in Online Support.
- Search for existing incidents by navigating to Updates + Fixes on Customer Connection.

- Trace the process. Note anything unusual and have your trace reports available to submit with your case.
- Attach trace files. You can help the Global Support Center make a speedy diagnosis of the problem by attaching trace files in Online Support.

Using the Global Support Center Escalation Process

You may escalate cases to the appropriate individuals or groups within PeopleSoft based on the impact an issue has on your business if:

- An incident is not fixed in the time frame you expected.
- A decision is made not to fix an incident.
- An incident needs a target date.
- You request a priority change on a case.

An escalation can occur at any time while a case is open. You initiate Global Support Center case escalation through the analyst assigned to the case.

Best Practices for Global Support Center Cases

An accurate and detailed business case is key to the success of the escalation process. When requesting escalation, you should have answers to the following questions:

- How many transactions per month does this issue impact?
- What percentage of your monthly total transactions does the issue directly affect?
- What impact is this issue having on your business?
- How frequently is the issue occurring?
- What is the estimated monthly financial impact of the issue?
- How much down time are you experiencing?
- How many users are impacted?
- How many additional resources have been required to work around the problem?
- What is the estimated amount of additional time required to complete tasks without the fix?
- When is a fix needed?

If You Still Need Help

Your account executive is responsible for ensuring your success and satisfaction with PeopleSoft. Your account executive can help you to escalate issues and find resolutions should you require assistance after first trying to find the answers via the online support self-service tools, the Global Support Center, or Customer Care.