# PEOPLESOFT CIS OVERVIEW

## PARTICIPANT GUIDE

Version 8.8 JANUARY 2004

Table of Contents

## LESSON 3



## APPENDIX B

# LESSON 1

## THE “V” CONCEPT

### OVERVIEW

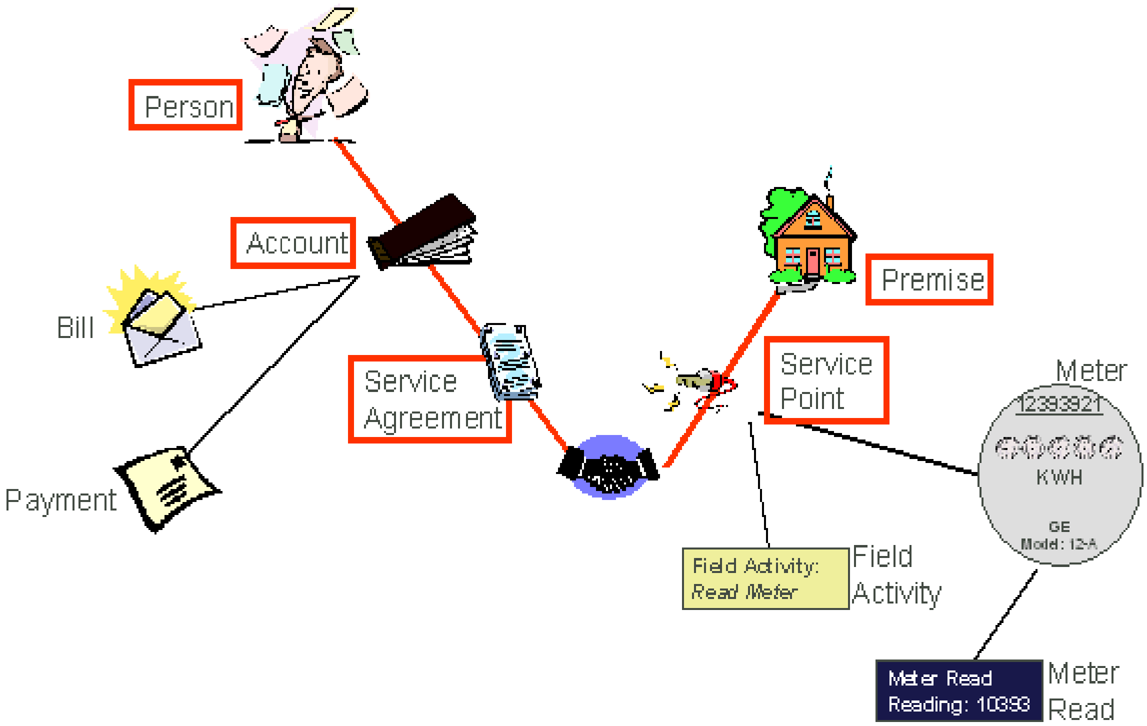
The “V” is the shape of the diagram we use to illustrate the objects that form the core of the system – Person, Account, Premise, Service Agreement, and Service Point. These objects hold demographic, geographic, and financial information about the customers and properties serviced by the company. The “V” also serves to illustrate the relationship between these objects in the system.

### OBJECTIVES

By the end of this lesson, you will be able to:

- List the 5 objects that comprise the “V”
- State the purpose of each object
- Describe how the objects are related

# THE "V"




## Key Concepts of the "V"

It is important for PeopleSoft users to learn some basic concepts in order to better understand how the entire system works and how the information is organized within the system.

PeopleSoft uses objects, or entities, to organize information. The following objects make up the "V":

- **Person** – Name of customer or business
- **Account** – Account number
- **Service Agreement (SA)** – Contract between customer and company
- **Premise** – Physical location where service is provided
- **Service Point** – Actual point of service (e.g. meter)

## Characteristics

Department-defined fields used to customize the vanilla CIS system. (See the complete V diagram in the Appendix.)

## RELATIONSHIPS IN THE "V"

A **Person** can exist by itself in the system. A person can also be linked to one or more accounts. A one to many relationships exists from Person to Account.

An **Account** is always linked to just *one* main person. An account can have one or more service agreements. A one to many relationships exists from Account to Service Agreement.

A **Service Agreement** is always linked to *one* account. A service agreement can be linked to one or more service points. A many to many relationship exists from Service Agreement to Service Point.

A **Premise** can exist by itself in the system. A premise can have one or more service points. A one-to-many relationship exists from Premise to Service Point.

A **Service Point** is always linked to a premise. A service point can be linked to one or more service agreements. A many to many relationship exists from Service Point to Service Agreement.

| WSIS | PEOPLESOFT CIS |
|---|---|
| WSIS gives users the ability to group individual accounts. Theses accounts are grouped together using a common group number assigned by WSIS. | The CIS system does not have group numbers. A person number, account number and service number link groups in CIS. |
| Even though the group has one group number, each account will have its own account number. | A person can be in CIS only once. |
| Even though the accounts are all grouped together, a separate bill will be created for each account. | One bill will be created with multiple bill segments. |

## PEOPLESOFT CIS ACCOUNT EXAMPLE

Below is example of one Account with two Service Agreements and one Premise. Each Service Agreement has one Service Point.

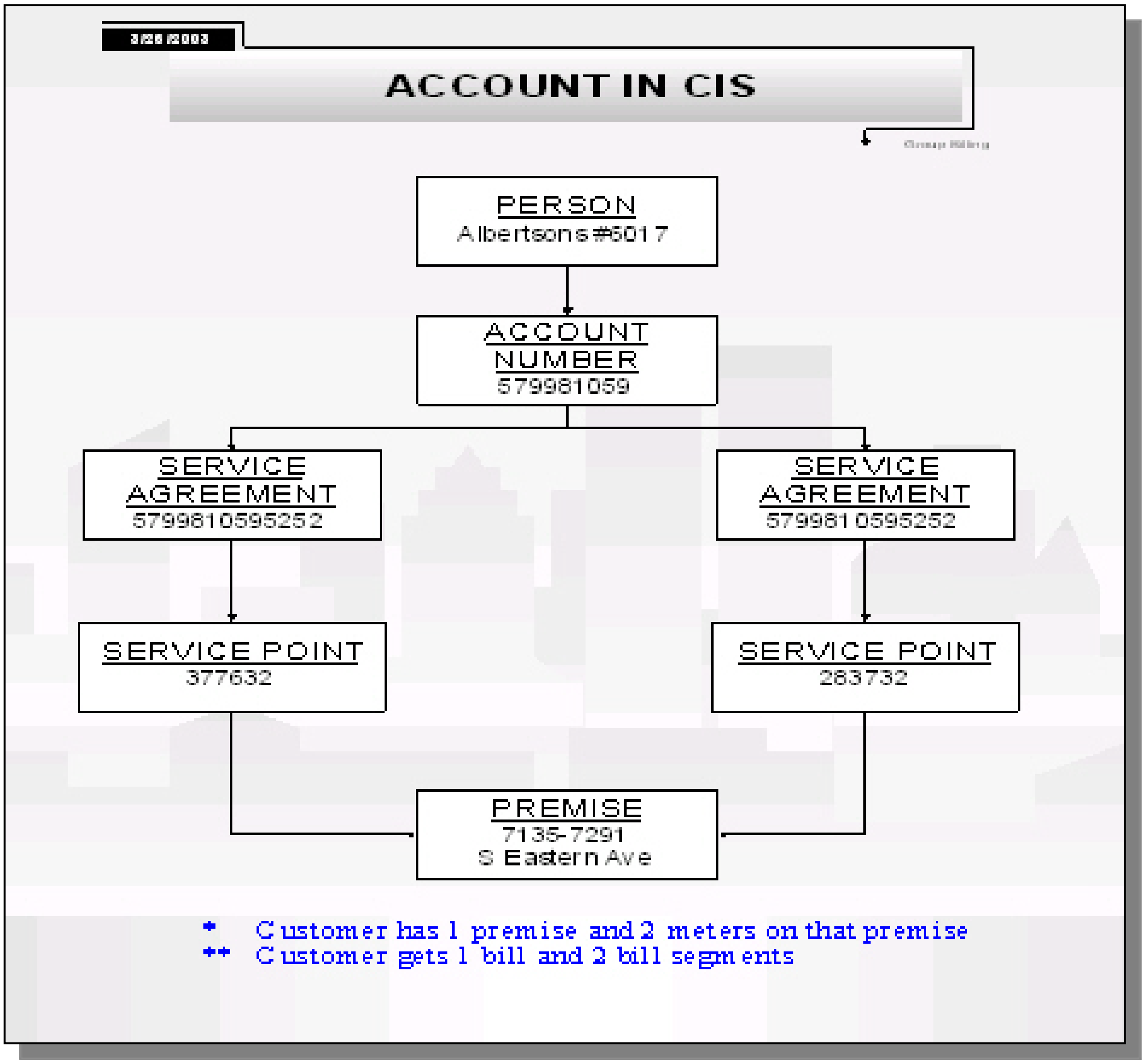



**Figure 1: Account Example 1**

## PEOPLESOFT CIS GROUPING ACCOUNTS EXAMPLE

Below is example of a Person with one Account, two Service Agreements and two premises. One Premise has one Service Point and the other has three. They may all be on one bill if they are all on the same Read schedule. However, you do have the option of not grouping accounts.

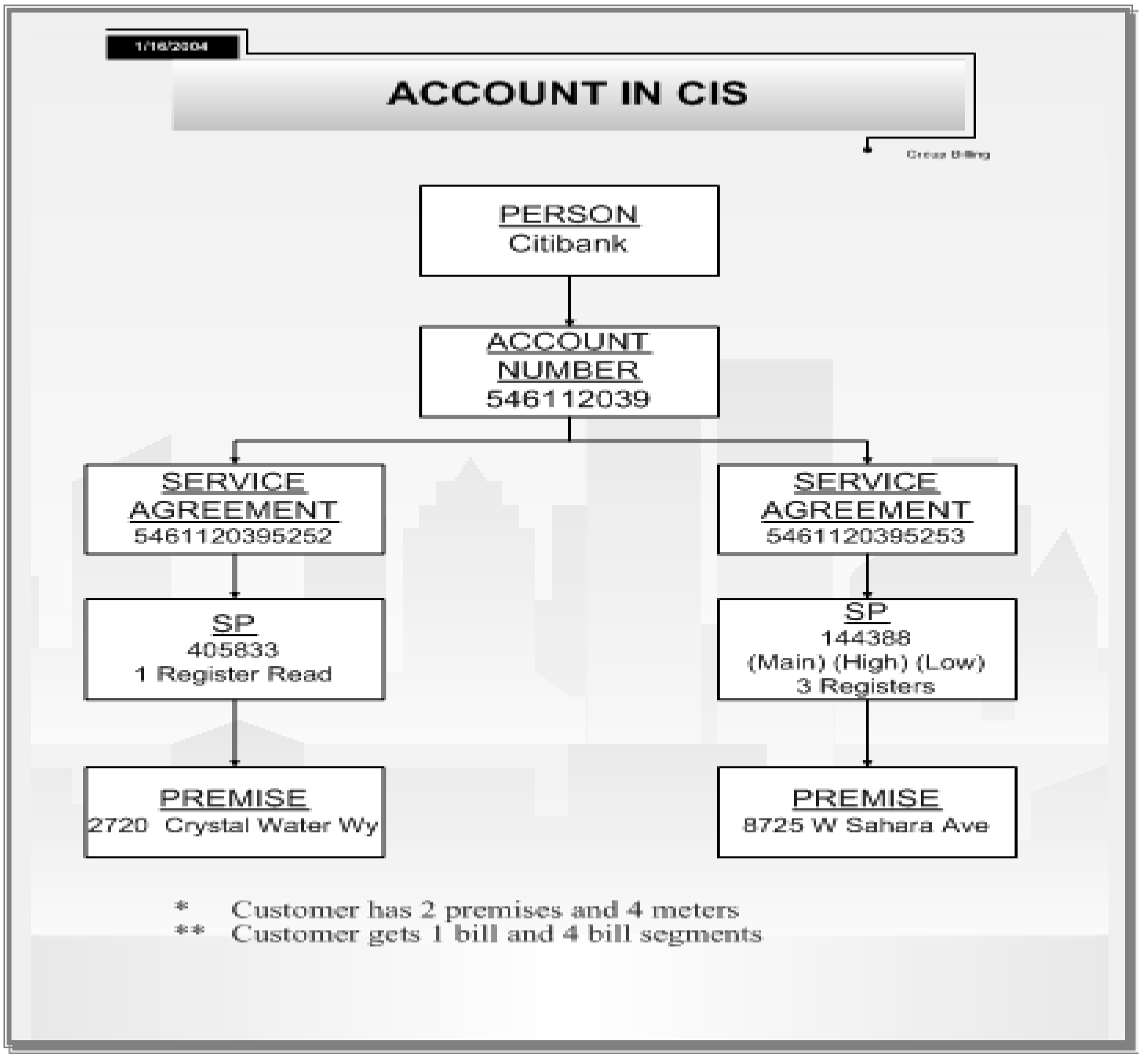



**Figure 2: Account Example 2**

# COMPARISON OF THE OLD AND NEW SYSTEMS

## Person

A Person exists for every individual or business with which the company has contact. Besides customers, persons exist for landlords, contractors, accountants, third party guarantors, etc. The Person record is used to maintain demographic information such as name, mailing address, phone numbers, life support flag and other useful information.

| WSIS | PEOPLESOFT CIS |
|---|---|
| One record for customer, spouses are on same record | Person record for each individual who is related to the account. One is designated as Main. If others exist, they can be designated as financially responsible or merely linked to the account, such as a landlord.<br>Records can be unlinked, for instance for a divorce, with acceptable proof, by effective dating the end of the relationship with the account. However, the record for the person stays in the system. |
| Customer | Equals a Person + an Account in CIS,<br>Can be a business or a group. |
| DOB accepted as ID | No longer accepting DOB as ID. Can collect 1-4 ID numbers, such as SS# and EIN. The current default notifies the CSR that the customer needs a DL# (if there is no ID). |
| Can password protect the account | If password protected, the primary ID will be the password. |
| Had one address per account | Can have multiple addresses associated with the account, but one will be designated as the mailing address. |
| Phones: Home and Work | Phones: unlimited, designate as needed |

## Account

An Account is an entity for which bills are created. At least one account must be created for every person who has financial obligations with LVVWD. The account record contains information that controls when bills are created and how they are formatted.

Every account must reference at least one person; otherwise, no one will be responsible for the account’s debt. We refer to this individual as the “main” person linked to the account. An account, however, can reference any number of persons, such as the contact person, third party guarantors of the account’s debt, recipients of copies of bills, landlords, etc.

Most accounts are linked to at least one service agreement because, without a service agreement, there is nothing on which a bill can be based. An account without a service agreement may exist, but it will not create a bill.

A person can exist without an account until the person formally requests the start of service. At that moment, an account must be created and the person must be linked to the account.

## Service Agreement

A Service Agreement is like a contract between the and the customer. The service agreement (SA) contains the terms and conditions controlling how the system calculates charges for the specific service supplied to the customer.

Every account should have at least one service agreement (otherwise, the account has no financial obligations to ). There is no limit to the number of service agreements that may be linked to an account.

SAs that bill for premise-based services are linked to one or more premises via their service points. These service agreements are referred to as Premise Oriented Service Agreements.

We also have service agreements that do not need a premise in order to bill. Some examples of this type of service agreement are: deposits, billable charges, permit fees, etc. These service agreements are called Non-Premise Oriented Service Agreements. An account may contain any combination of premise and non-premise service agreements.

At the Service Agreement we can generate how much a given amount of consumption will cost the customer, given their specific contract terms using the existing rate history or comparing the service agreement’s rate to another rate.

| WSIS | PEOPLESOFT |
|---|---|
| Customer display account contains account and tenant numbers | Old WSIS account and tenant numbers are located on the SA |
| Bill payment screen holds charges and balances | Holds the charges and balances for the account |

## Premise

A Premise must be created for every location to which we supply service. A premise is used to maintain geographic information such as address, county, meter read instruction code, etc. In addition, characteristics added to the premise include well status, rate area, jurisdiction and others. (See the list of characteristics on the PeopleSoft “V” diagram, Appendix A.)

| WSIS | PEOPLESOFT |
|---|---|
| Service address on main screen | Service address on Premise |
| Service location / meter display | Rate area |
| Service location / meter display | Meter read instructions with codes, details and warnings |

## Service Point

A Service Point is a specific location at a premise where we supply service. It roughly equates to a meter. The service point contains information describing the type of service and how it is measured.

A premise should have at least one service point (otherwise there are no services supplied to the premise). However, a new premise can exist without service points until it is ready to physically start service at the premise (such as in a new development with no occupied structures).

| WSIS | PEOPLESOFT |
|---|---|
| Reading / Consumption Account screen | All readings are held in the same place, on the service point |

## Notes:

# LESSON 2

## NAVIGATING THROUGH THE PEOPLESOFT CIS SYSTEM

## OVERVIEW

This lesson introduces basic PeopleSoft navigation including sign in, menus, sign out and help functions.

## OBJECTIVES

By the end of this lesson, you will be able to:

- Sign In to PeopleSoft
- Navigate through the Universal Header
- Navigate through the Menu
- Access PeopleBooks
- Minimize and Maximize the Menu
- Open a new window
- Sign Out of PeopleSoft

# ACCESSING THE PEOPLESOFT APPLICATION

To access PeopleSoft, you must first launch your Internet browser. In the classroom-training environment, you will have a PeopleSoft icon on your desktop or you may choose to navigate to the Internet Explorer by selecting *Start > Programs > Internet Explorer*. The Sign In page is presented below.

## Sign In for Training

**Steps:**

1. Double-Click the **PeopleSoft** icon to open the Sign In page. Enter the User ID of **TRAIN*XX*** and the password **TRAIN*XX*** (both in upper case). The *XX* represents *your station number (*for example – *User ID: TRAIN02* and *Password TRAIN02).*
2. Click 

shown below.


**Figure 3: PeopleSoft 8 Sign In page**

**<u>Notes:</u>**

# UNIVERSAL NAVIGATION HEADER

The universal navigation header is located at the top of your PeopleSoft page and remains stationary as you navigate through the pages. The navigation header contains the following links, all shown below: Home (home page), Add to Favorites, Sign out and Search.

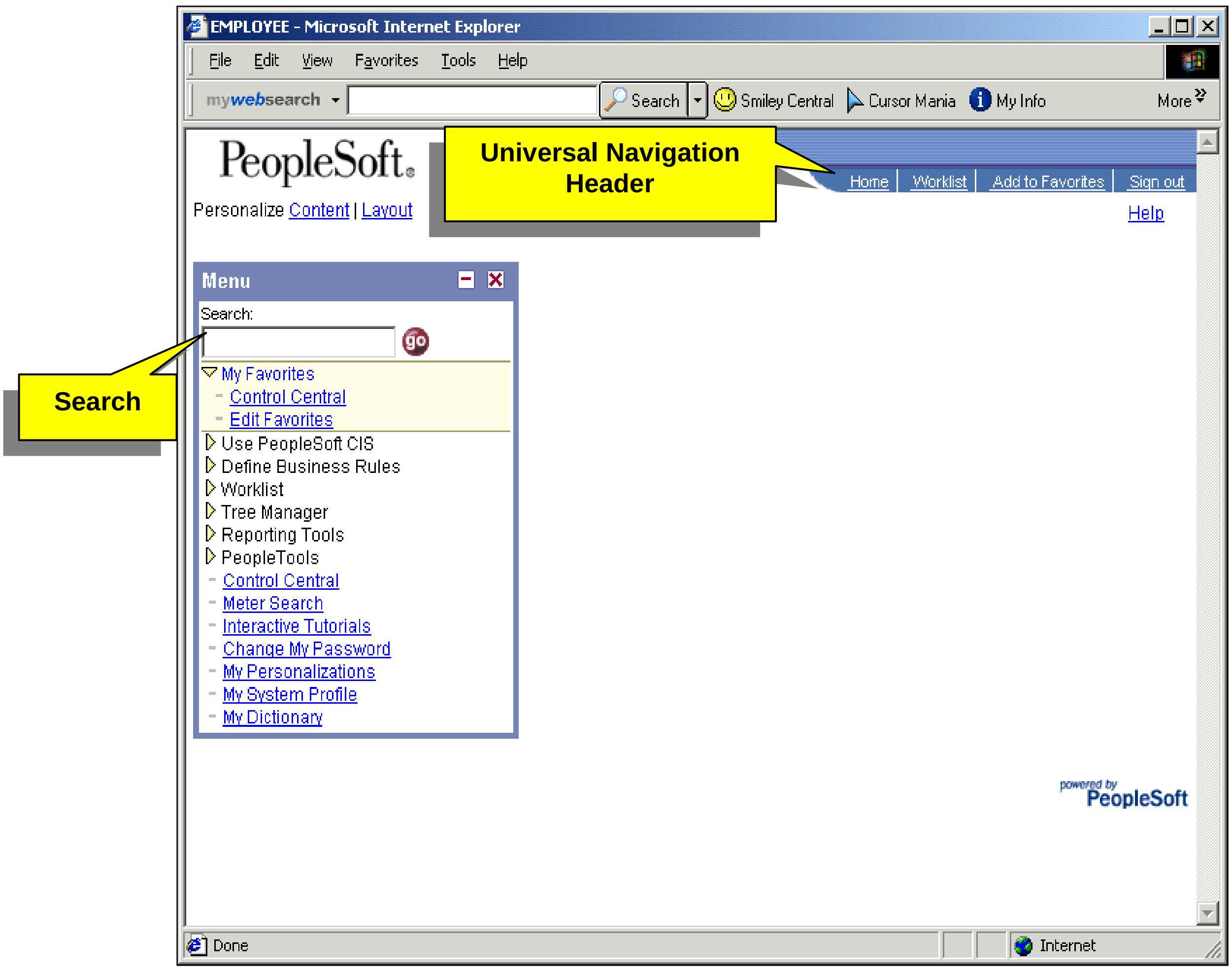



**Figure 4: Universal Navigation Header**

**NOTE** – When navigating through PeopleSoft, It is recommended that you do not use the Internet Explorer (IE) “back” or “forward” buttons. This can result in your page not displaying correctly.

## Universal Navigation Header Definitions

| LINK | DEFINITION |
|---|---|
| **Home** | The ***Home*** link returns you to your PeopleSoft homepage. |
| **Add to Favorites** | The ***My Favorites*** link allows you to create your own list of bookmarks. Once you add a favorite, it is maintained under the My Favorites folders in the menu. |
| **Sign out** | Select the ***Sign out*** link to log off from the application and return to the sign on page. |
| **Search** | The ***Search*** box allows you to query for any page. |

# MENU

Once you have signed in to PeopleSoft, you are presented with a *Home page*. The home page presents you with a Menu that lists the folders to which you are granted access. PeopleSoft navigation functionality is sorted into distinct categories, including:

- ▶ Folders
  - ▶ Additional Folders (Which you may or may not have depending on which menu you access)
    - Links
      - ☺ Transaction Pages

## Folders and Links

Folders represent functional categories. Once you navigate through a folder or any additional folders, which you may or may not have depending on which menu you access, all pertinent functions are available within the various Links. The Links vary from menu to menu.

PeopleSoft applications are pure intranet-based. Point your mouse to the menu group you want to access and see the image of the small hand appear. This means that the item to which you are pointing is hyperlinked and the system will allow you to select the item. Once you have selected the item, the system opens the corresponding additional folders immediately.

## Transaction Pages

Transaction pages are used for display and data entry. These pages will appear in the browser window.

**Steps:**

1. To see Transaction Pages, click the **<u>Control Central</u>** link from the Menu.

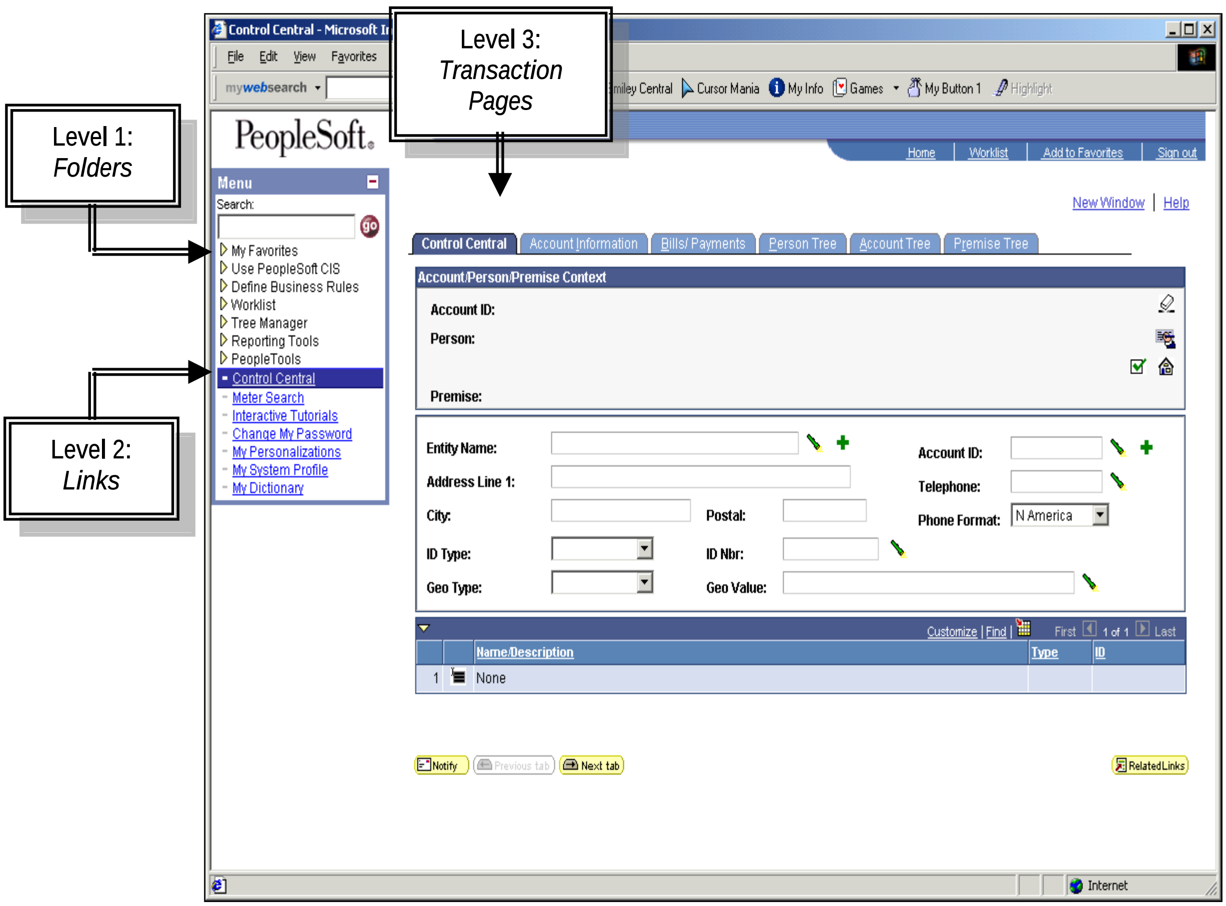



**Figure 5: Navigating Through the PeopleSoft System**

| Display | Action |
|---|---|
| ▶ | Folder collapsed |
| ▼ | Folder expanded |
| – | Link to Transaction Page |

# ACCESSING PEOPLEBOOKS

You can access PeopleBooks from any menu. Simply click the **Help** link shown below. If you want information regarding a specific function, make sure you are on that function's specific page before you click the **Help** link.

## Help with a Specific Function

**Navigate to:** Home > Control Central

**Result:**
The *Control Central* page, similar to the page below, will display.

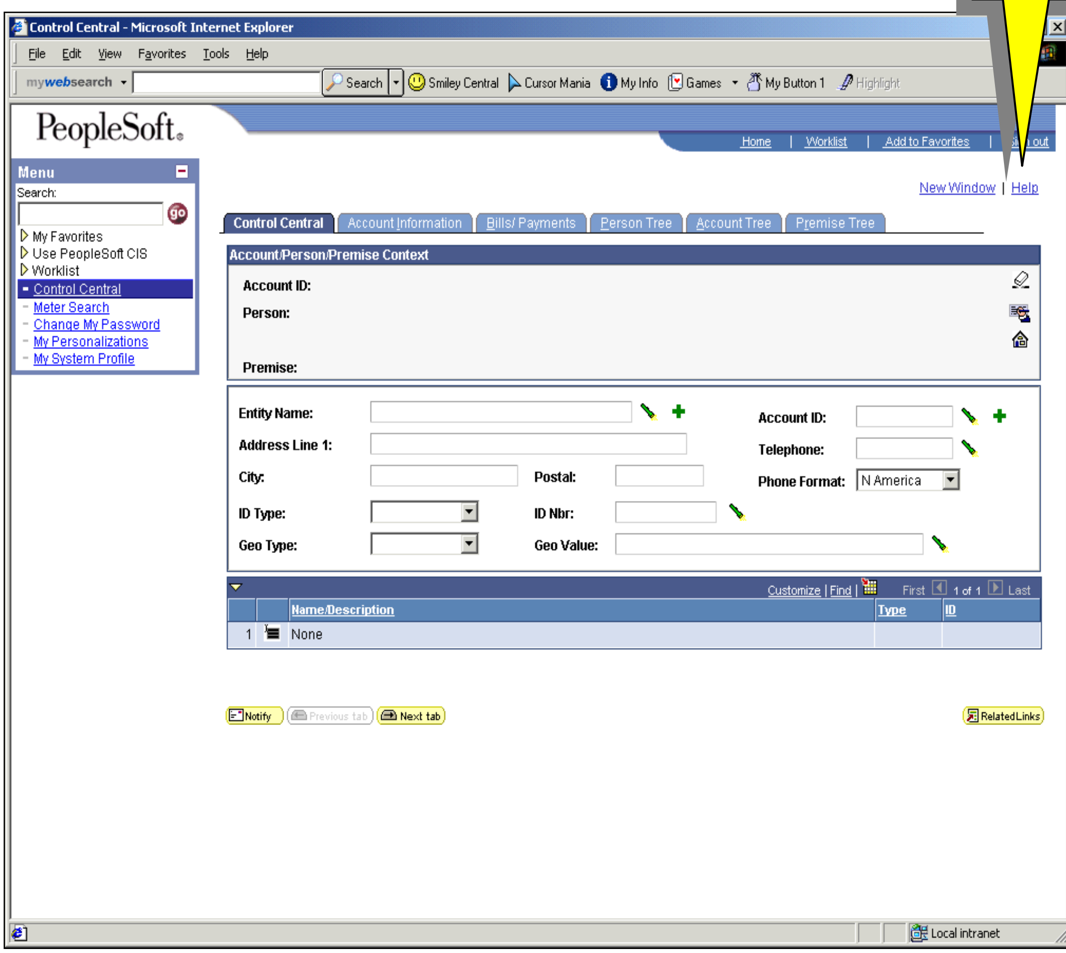



**Figure 6: Control Central page**

**Steps:**

1. Click the **Help** link shown above.

**Result:**
The *PeopleSoft 8.8 CIS PeopleBook* page, similar to the page below, will display in a new window.

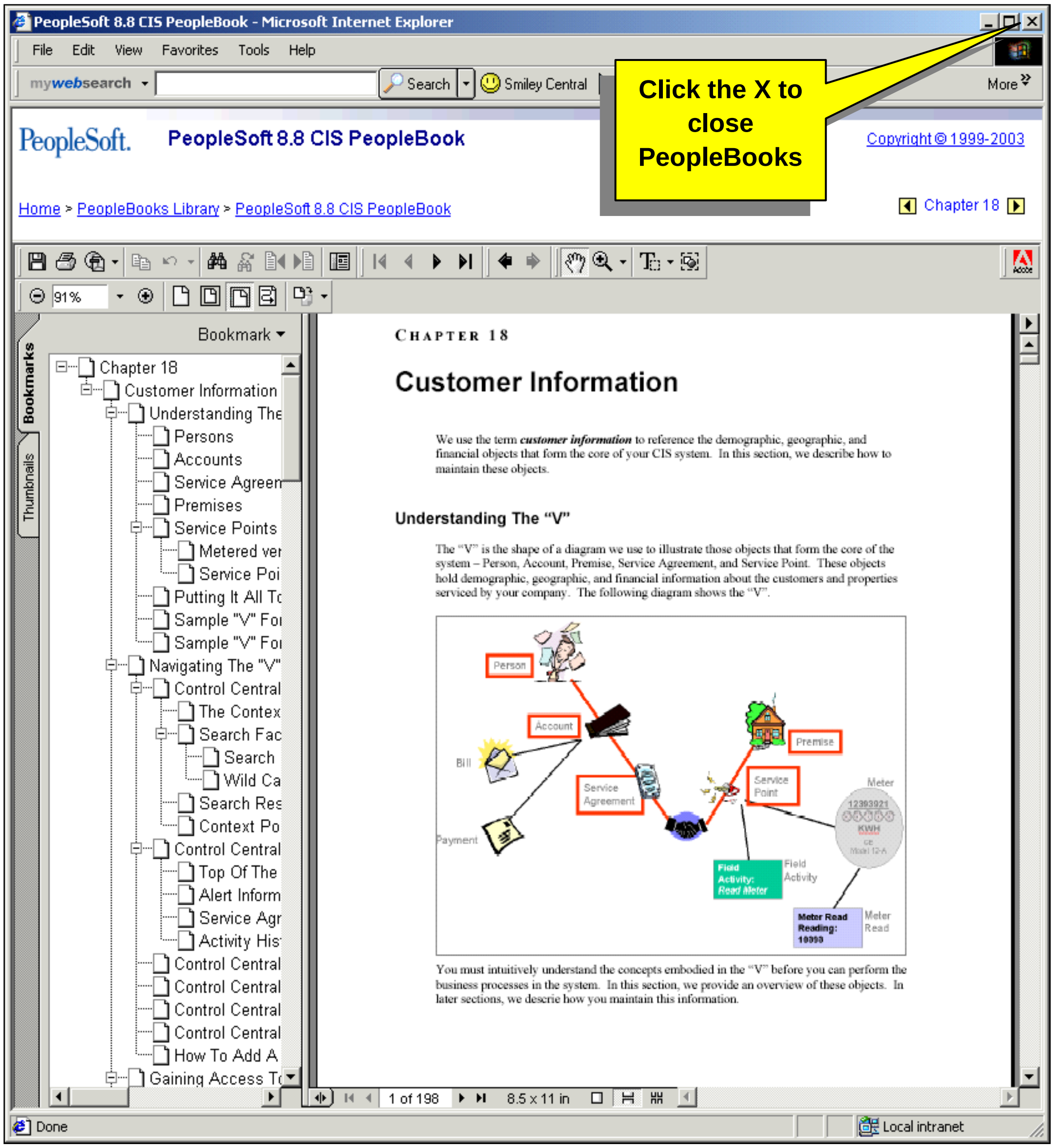



**Figure 7: PeopleBooks Home page**

**Steps (continued):**

2. To view a specific topic, locate and click that Bookmark.
3. To close PeopleBooks, simply click the **X** in the top right of the screen.

## MINIMIZE AND MAXIMIZE THE MENU

If you are working in one page and want to see another page, without having to save or cancel the page in which you are working, PeopleSoft allows you to open additional browser windows.

**Navigate to:** Home > Control Central

**Result:**

The *Control Central page*, similar to the page below, will display.

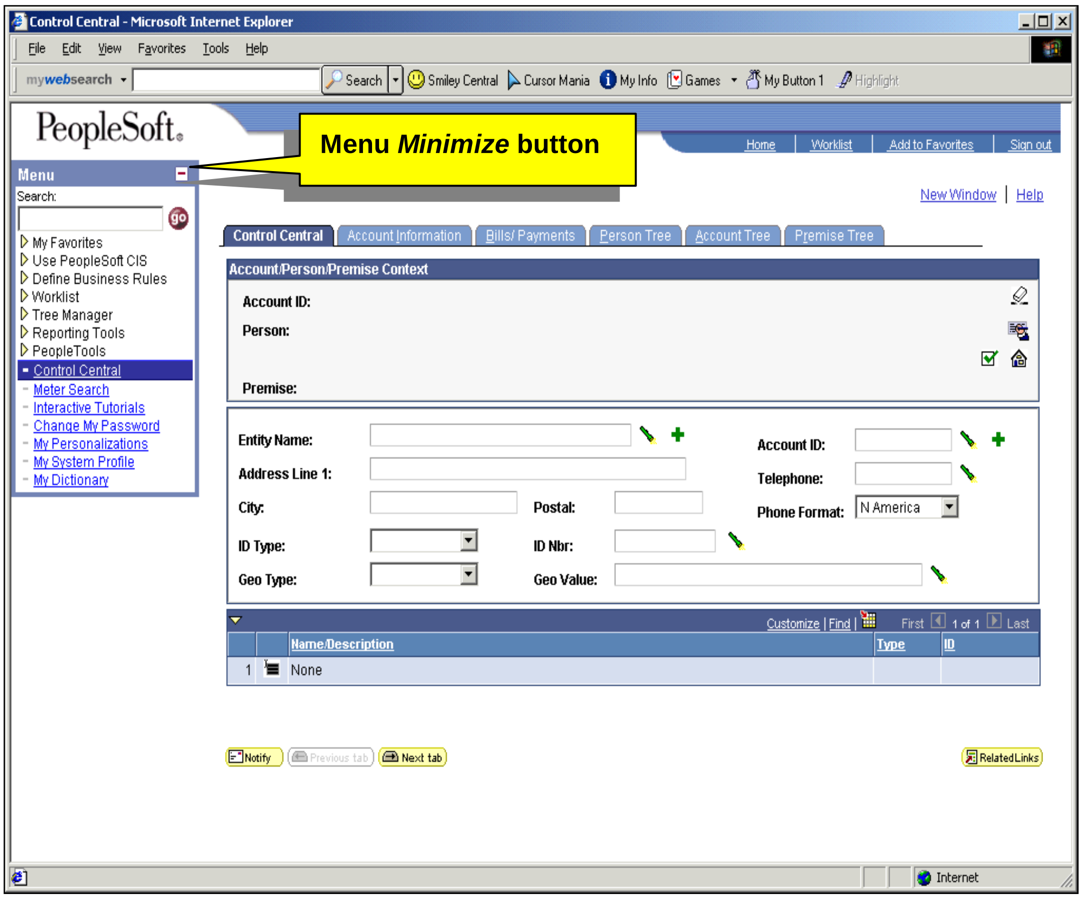
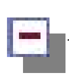



**Figure 8: Opening a New Window**

**Steps:**

1. Click the **Menu Minimize**  button shown above. This will give the page more space to display.

**Result:**
The *Control Central* page, similar to the page below, now has more room for display.

✓ Notice the **Menu Minimize**  button now shows a **Menu Maximize**  button, shown below. It works like a toggle.

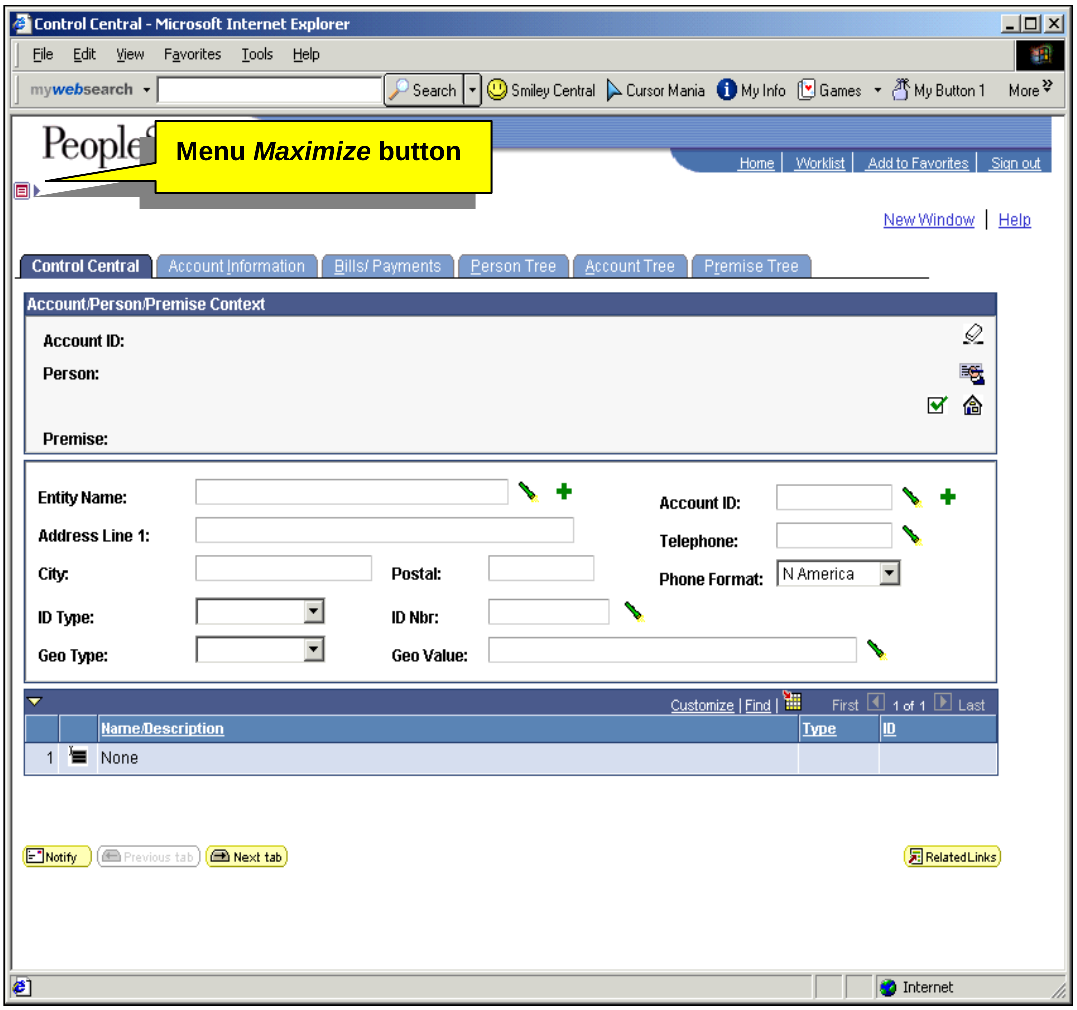



**Figure 9: Control Central page**

## Opening a New Window

If you are working in one page and want to see another page, without having to save or cancel the page in which you are working, PeopleSoft allows you to open additional browser windows.

**Steps:**

1. Click the **New Window** link, shown above, to open a new window.

**Result:**

A new window, smaller than your currently open window, will display.

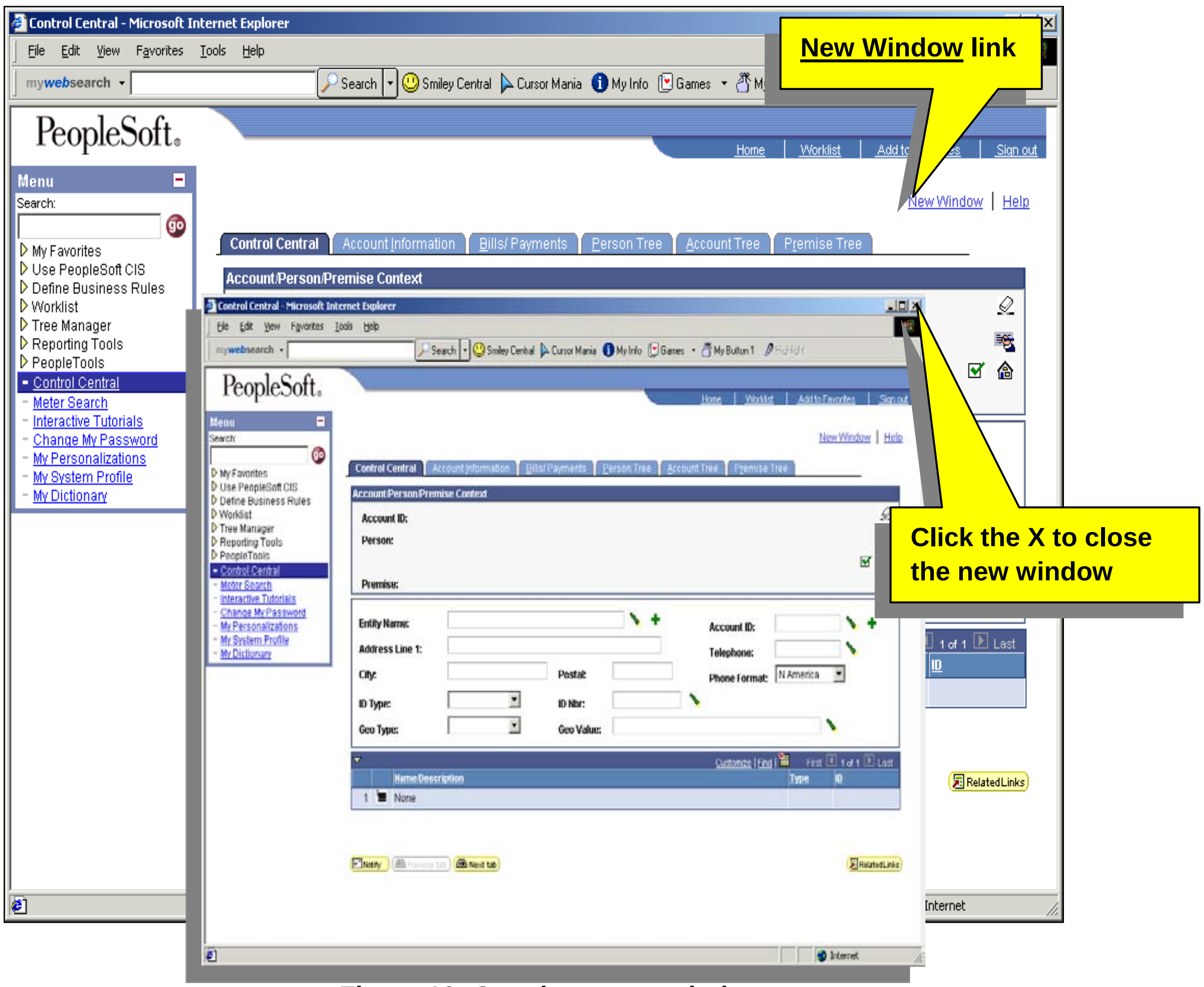



**Figure 10: Opening a new window**

**Steps (continued):**

2. Click the **X** in the top right of the newly opened window to close the new window. If you select the **Sign out** link, you will sign out of PeopleSoft completely.

## Notes:

## CONNECTION EXPIRED

For increased security on the PeopleSoft site, your connection will expire after **60 minutes of non-use**.

**Steps:**

1. To sign back in to PeopleSoft, click the **Return to PeopleSoft 8 Sign In** link shown below.

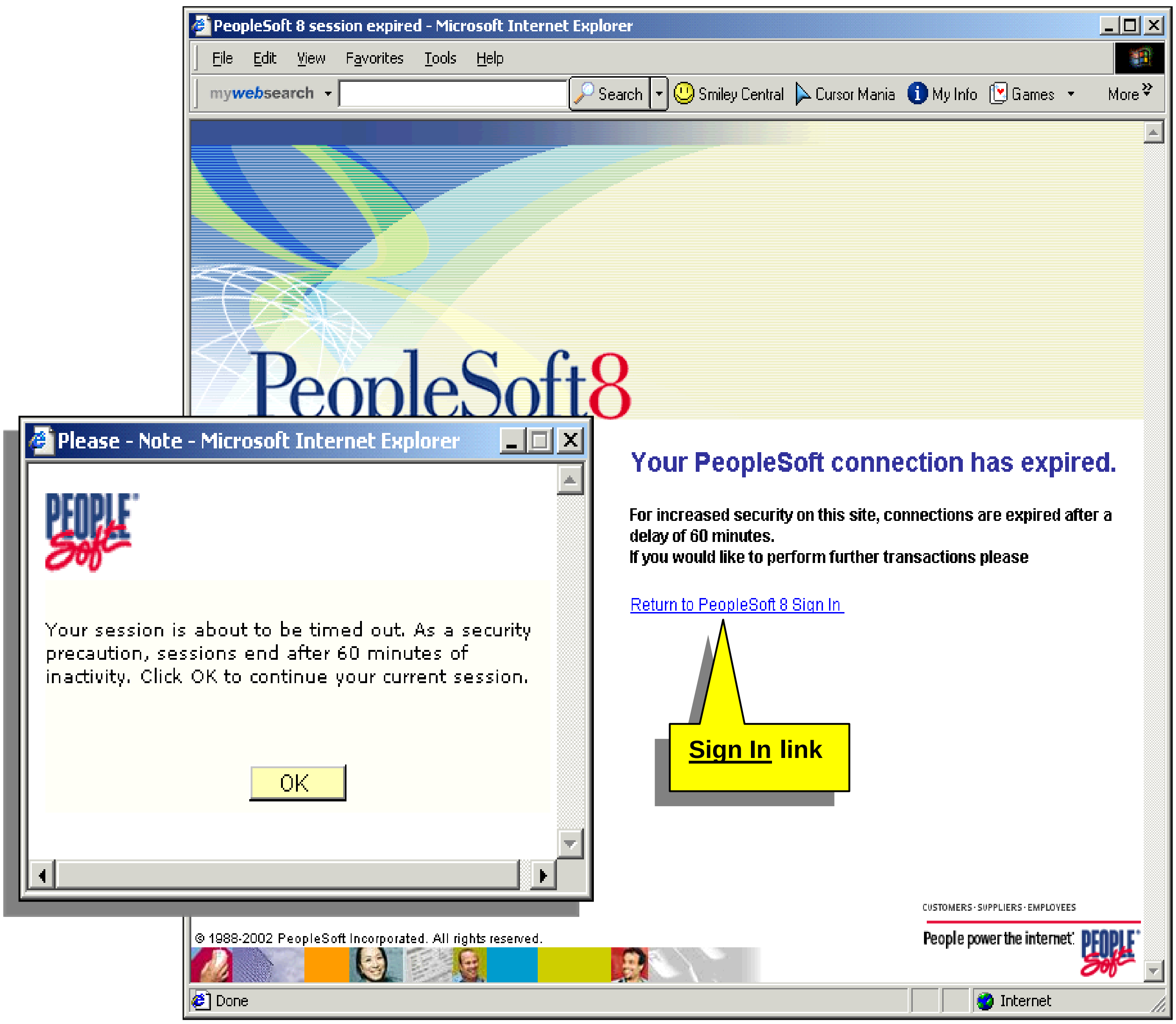



**Figure 11: Return to PeopleSoft 8 Sign In page**

**Notes:**

# PEOPLESOFT SIGN OUT

It is extremely important that you Sign out of PeopleSoft properly. Closing the web browser **does not** properly log you out of PeopleSoft and may result in resource and server errors.

**Steps:**

1. Click the **Sign out** link, shown below, at the end of your PeopleSoft session to properly disconnect from PeopleSoft.

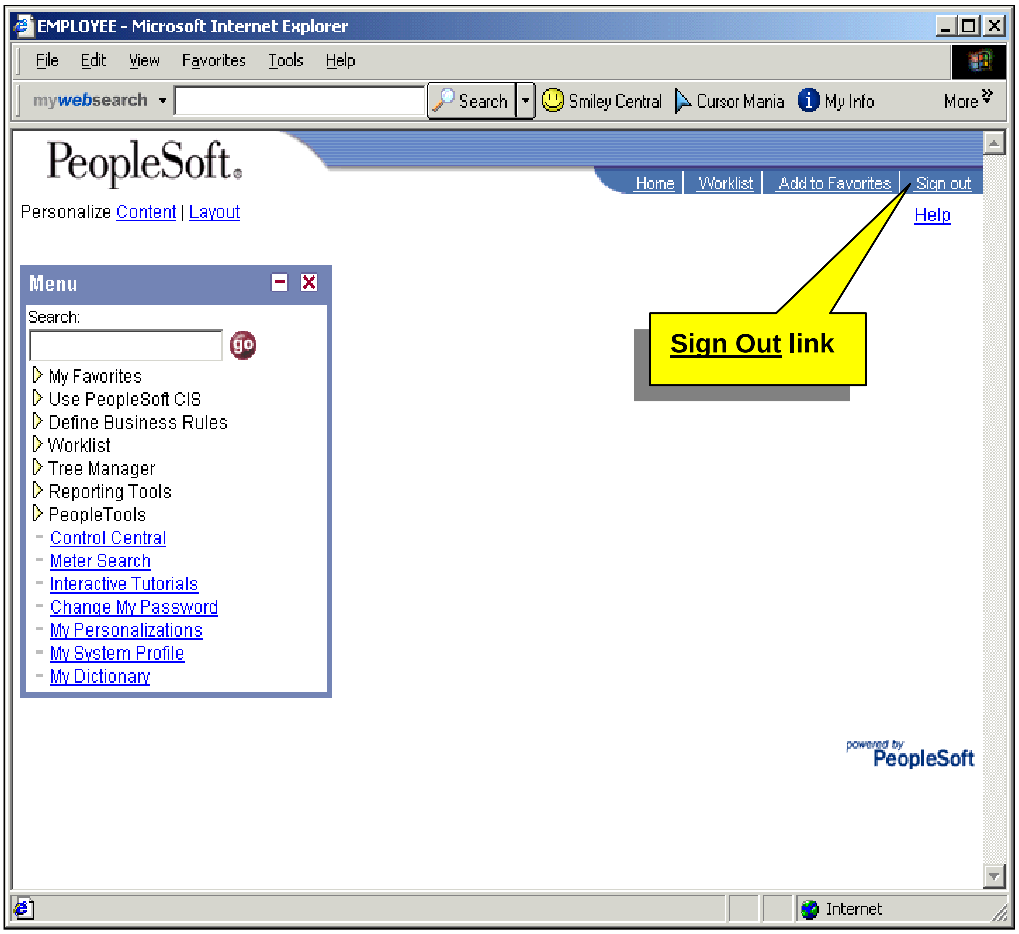



**Figure 12: PeopleSoft Sign Out**

**Result:**
The *PeopleSoft 8 Sign In* page, similar to the page below, will display. You have successfully signed out of PeopleSoft.


**Figure 13: PeopleSoft 8 Sign In page**

# LESSON 3

## CONTROL CENTRAL

## OVERVIEW

This lesson introduces Control Central and how it is used to perform searches for customers and account information. There are many ways to search in PeopleSoft. In this lesson, we will walk you through the most common methods.

## OBJECTIVES

By the end of this lesson, you will be able to:

- Identify the tabs in Control Central
- Identify the Action Buttons
- State the difference between the Links Icon and the Related Links Button
- Search for Customers
- Perform searches with partial information
- Find a Service Agreement
- Display Bill information
- Locate Backflow information
- Find a Meter and Read information

# CONTROL CENTRAL

Control Central offers a single location in the system to conduct many searches. You can use a number of parameters, both complete and partial, to locate a customer. Use the related links icons and buttons to review related information such as: history of bills and payments, history of addresses linked to the account, etc.

You may also "drill down" to other windows or pages where maintenance is performed.

## Search for a Customer

Let’s search for the .

**Navigate to:** Home > Control Central

**Result:**
The *Control Central* page, similar to the page below, will display.

**Steps:**

1. Enter the Entity’s full or partial Entity name in the *Entity Name* field. For training use **Golden**.
2. Click the **Search**  icon to be presented with search results.

**Result:**
To *Control Central* page, similar to the page below, will return populated.

**Figure 14: Control Central page**

## Action Icons

Each icon performs a specific task. Once you have the account information, you may select the *Action Button* for the appropriate task.

**Figure 15: Control Central page**

### *Definitions of Icons*

**Clear** – Clears the information in the fields.

**Start Service** – Starts Service for this Person/Account Relationship.

**Stop Service** – Stops service for this service agreement.

**Add Premise** – Takes user to the Premise notebook in add mode with the premise that was searched already defaulted.

**Add Payment** – Users will click this button to add a new payment event for the selected account. The system transfers the Account ID and current balance to the payment event add dialog.

## Notes:

## Related Links Icon and Button

Once you have located a customer record, you can click the **Related Links** icon to the right of an Item. This will display a list of all related links pertaining to the item. If you click the button, a list of links will display.

Each menu item represents a different window. When a menu item is selected, the system opens the respective window and passes to it the ID of the related object.

**Figure 16: Control Central page**

### *Using the Related Links Icon*

**Steps:**

1. Click the **Related Links** icon to the right of the *Premise* line, from the *Control Central* page.

**Result:**
The *Related Links – Premise* page, similar to the page below, will display.


**Figure 17: Related Links – Premise page**

**Steps (Continued):**

2. Click Cancel to return to the *Control Central* page.

## Using the Related Links Button

**Steps:**

1. Click RelatedLinks in the lower right of the *Control Central* page.

**Result:**

The *Related Links* page, similar to the page below, will display.

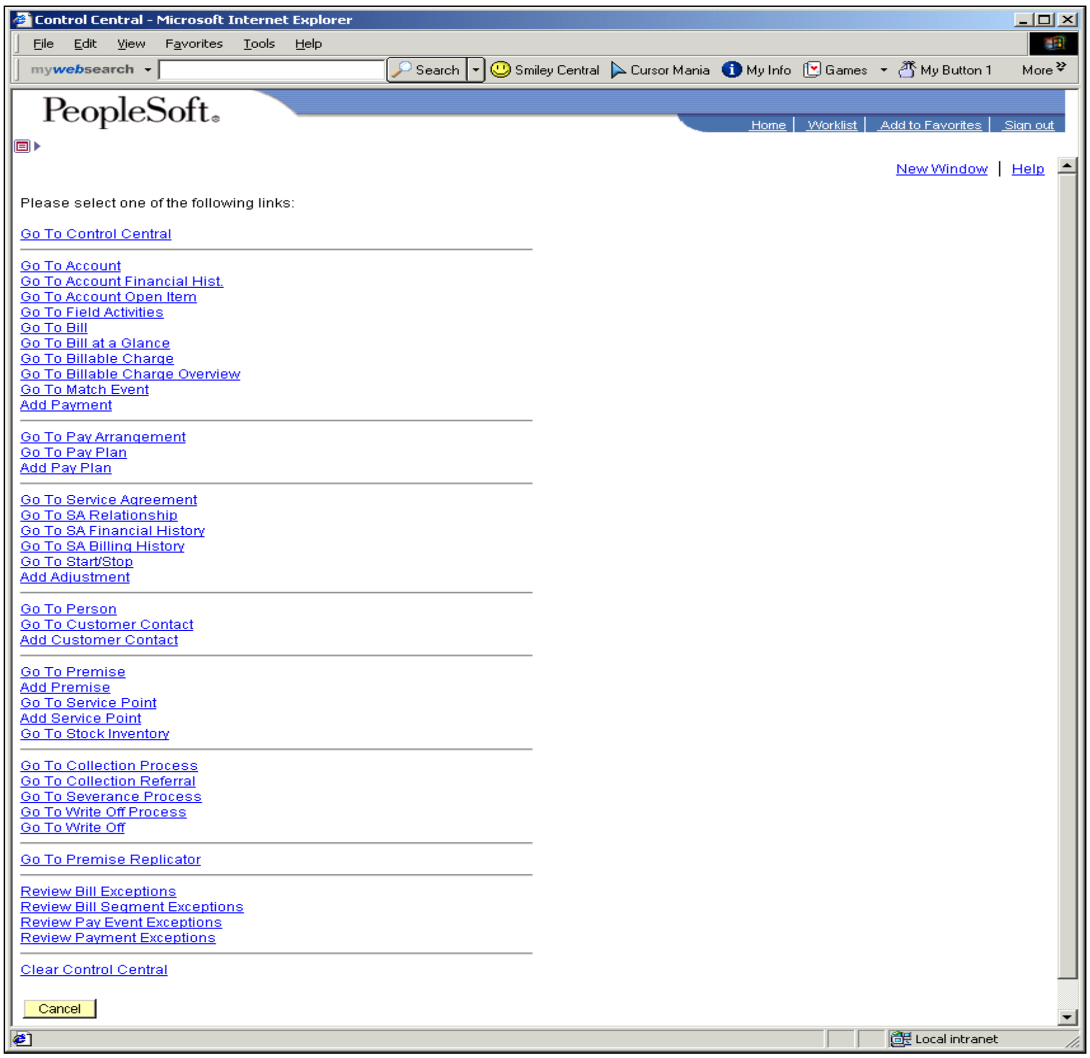



**Figure 18: Related Links page**

**Steps (Continued):**

2. Click Cancel to return to the *Control Central* page.

## Tabs in Control Central

Information in Control Central is organized logically by tabs.

### *Account Information Tab*

The next tab, Account Information, provides summary information regarding the account, person or premise that was searched. It also has information regarding the activity of the account.

### *Bills/Payments Tab*

The Bills/Payments tab provides summary information regarding the bills and payments on the account.

### *Person Tree Tab*

This tab is to provide summary information (current and historical) for the person record. It gives a quick visual representation, with links, of the persons related to the account and the relationships between them.

### *Account Tree Tab*

The Account Tree tab provides summary information (current and historical) for the account and service history for all premises linked to the account. Again, it provides a quick visual representation of the relationships, as well as links to the related documents.

### *Premise Tree Tab*

Like the tabs above, the Premise Tree tab provides summary information (current and historical). It gives a visual representation, with links, about a premise and all accounts related to that premise.

## Find a Service Agreement

Now let's look at the Nugget's Service Agreement.

**Steps:**

1. Click the Account Information tab.

**Figure 19: Control Central – Account Information page**

2. To view the Service Agreement options, click the **SA Related Links** icon.

**Result:**

The *Related Links – Service Agreements* page, similar to the page below, will display.

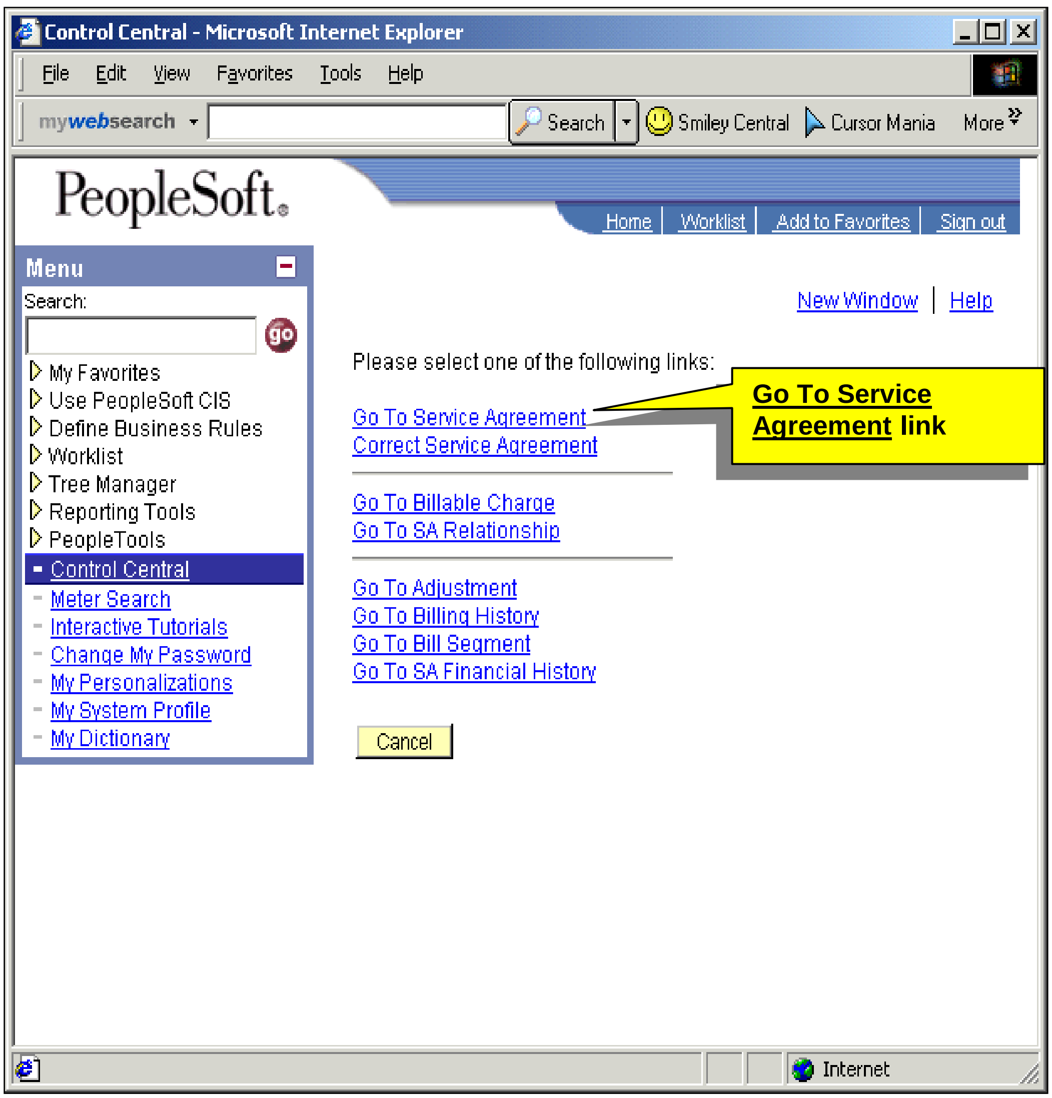



**Figure 20: Related Links – Service Agreements page**

**Steps (continued):**

3. Click the <u>**Go To Service Agreement**</u> link.

**Result:**

The *Control Central – Service Agreement* page, similar to the page below, will display.

**Figure 21: Control Central – Service Agreement page**

**Steps (continued):**

4. After reviewing the **Service Agreement** tab, **SA/SP** tab and the **Char** tab, click the <u>**Control Central**</u> link from the *Menu* to return to the *Account Information* page.

**Notes:**

## *Service Agreement Billing History*

Now let's go see the Service Agreement History

**Result:**
The *Control Central – Account Information* page, similar to the page below, will display.

**Figure 22: Control Central – Account Information page**

**Steps (continued):**

5. Click the **Account ID Related Links** icon.

> **NOTE** – The Account Information tab only displays general account information. To view detail account information, refer to page Error! Bookmark not defined..

**Result:**
The *Account – Related Links* page, similar to the page below, will display.

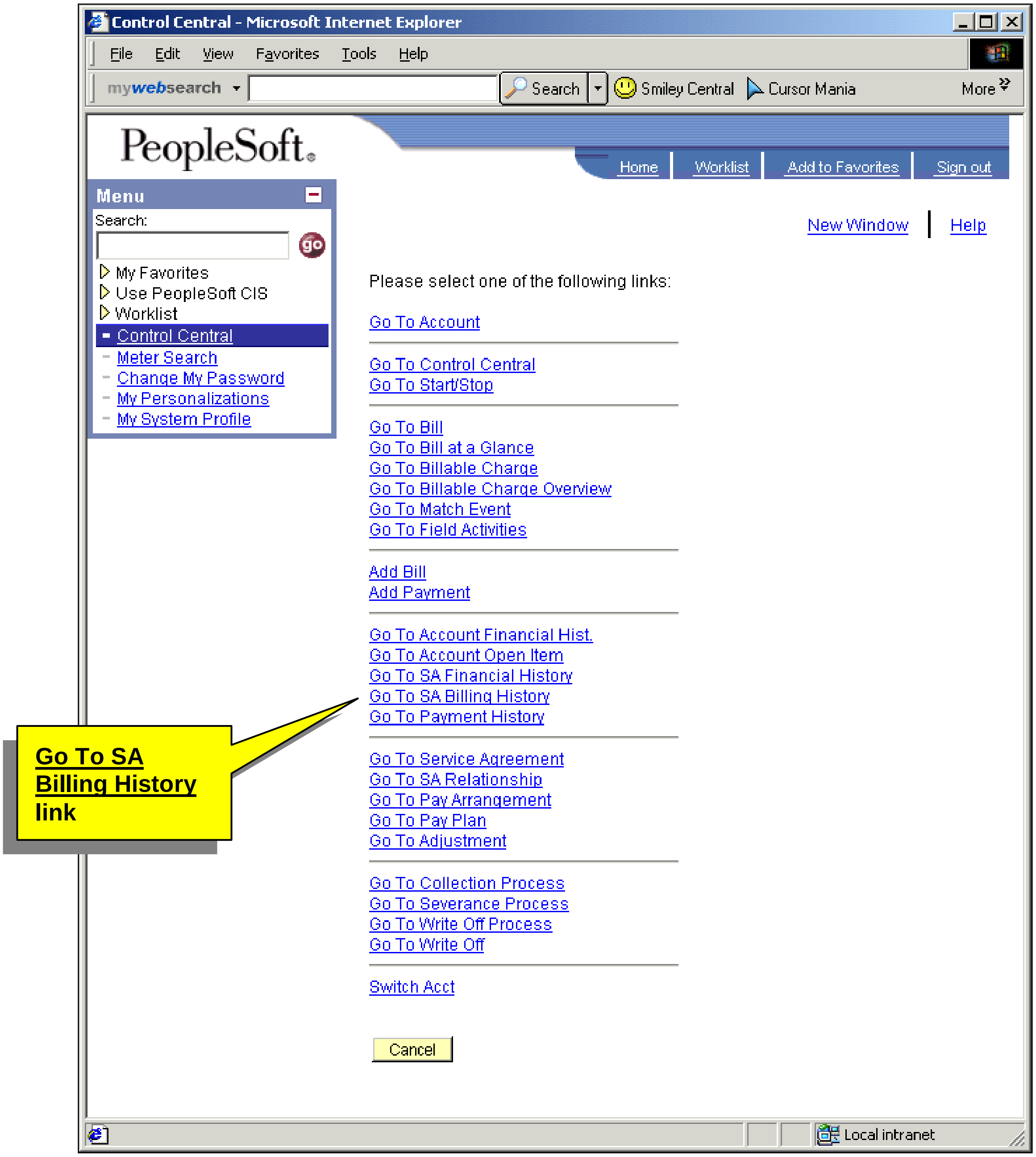



**Figure 23: Account – Related Links page**

**Steps (continued):**

6. Click the **Go To SA Billing History** link show above.

**Result:**
The *Account – SA Billing History* page, similar to the page below, will display.

**Figure 24: Account – SA Billing History page**

7. After reviewing the SA Billing History Information, click the **Detail** tab.

**Result:**
The *Account – Detail* page, similar to the page below, will display.

**Figure 25: Account – Detail page**

8. After reviewing the Detail Information, click the **Control Central** link from the *Menu*.

**Result:**
The *Control Central – Account Information* page, similar to the page below, will display.

**Figure 26: Control Central – Account Information page**

9. Click the **Bills/Payments** tab.

## Notes: