



PeopleSoft Self-Service 2.0

Learn how to bring Web 2.0 to Self-Service

Session# 26891

Date: Tuesday, March 24, 2009 11:10 A.M. to 12:10 P.M.

Paul Isherwood – IntraSee





Who Am I?

- Founding member of IntraSee, a technology consulting and software company specializing in portals, self-service, integration, security, architecture, performance, implementations and PeopleSoft usability.
- Spent almost 10 years at PeopleSoft, presenting at many user's conferences.
- Specialize in embedding Internet technologies and features into a PeopleSoft framework
- Have a PeopleSoft bolt-ons to enhance usability



About This Session

- People are used to using slick and intuitive web sites on the Internet
- When exposed to PeopleSoft applications the difference in the User Interface is startling and off-putting
- But PeopleSoft, using a variety of options, can be just as exciting, relevant, and Web 2.0 enabled as these applications and sites like Yahoo.com.
- Hard to believe? The following session explains all.....



Agenda

- Five methods for bringing a Web 2.0 UI to PeopleSoft
- ADA Compliance and Web 2.0
- Technology Options for achieving a Web 2.0 UI



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1: Change the Look

- Out of the box PeopleSoft looks one way, but without touching any vanilla objects it can be switched to look completely different
- Using the Pagelet Wizard and adding a HTML object a component can be completely changed – without changing it!





2. Change the Behavior

- Out of the box even the self-service applications are clunky and unintuitive
- Two methods can be used to change this
 - Hide unnecessary steps
 - Don't make people work harder than they have to
 - Avoid unnecessary clicks
 - Add desired steps
 - Make PeopleSoft more friendly



2. Change the Behavior

Menu

- Assembly Wizard Pages
- IS - Hidden
- IntraSee Menu
- Assemble Pages
- Enterprise Components
- PeopleSoft
- My Content
- Content Management
- Portal Administration
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools

Event Export

Enter Email To and Email Subject for sending the event as an attachment.

Email Options

Email To:

Email Subject:

Send Email

Cancel

[Close](#)

Email To:

Email Subject:

Send Email

Headline News

- [A Visitor's Guide to the San Francisco area](#)
- [PeopleSoft Ships Industry's First Pure Internet eBusiness Software](#)
- [Get the Weather Report](#)

Friday, Mar 27

9:01:05 PM - 02:05 PM [Benefit Enrollment Meeting](#)

Location: Building One Lobby

[Full Page View](#)



2. Change the Behavior

- **Demo of Calendar before and After**
 - Shows changing the look and behavior



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3. Provide Help & Guidance

- Typically a process, like transfer an employee, enroll in a class, getting started as a new student, isn't simply the case of entering data in one PeopleSoft page
 - It is more often one step of a multi-step process
- Guide the user through a multi-step process
 - Let the software be the guide
 - Don't make people pick up the phone and ask, "what do I do?"



3. Provide Help & Guidance



My Links: Search:

Select One:



Follow These Steps

1. New Student Overview
2. Verify Personal Information
3. Emergency Contacts
4. Review Transfer Credits
5. Review Course Catalog
6. Add/Drop Courses
7. Buy Books Online
8. Computer Security FAQs
9. Other Campus Resources

Personal Info Tips

- Your grades and tuition statements will be mailed to this address. Please ensure it is correct.
- Changes to your address can result in changes to tuition. Please contact your advisor for help on this issue.

Get Started as a New Student - Verify Personal Information

Personal Information

Emmylou Dell

Name

Emmylou Dell

[Change name](#)

Addresses				
Address Type	Status	As Of	Country	Address
Home	Current	08/01/1999	USA	50 Sweet Jog Trail Bellbrook, OH 45305 Warren
Mailing	Current	08/01/1999	USA	50 Sweet Jog Trail Bellbrook, OH 45305 Warren

[Change home/mailling addresses](#)

Phone Numbers



3. Provide Help & Guidance

- Demo of How Do I



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4. Extend the Functionality


- Sometimes the functionality is so far from how you'd want it to work you have to redesign the interface
 - Manager self-service is one example
- PeopleTools includes the features that allow you to extend using the latest technology
 - Make PeopleSoft work more like Workday or Success Factors




4. Extend the Functionality

My Reports  

Direct Reports for H262,0007013995

Name	Business Phone
<u>M252,0007038608</u>	011 404 827 4487
<u>M622,0007049403</u>	011 404 827 5504
 <u>S335,0007039688</u>	001 404 878 2111

[Up One Level](#) Reset View

Click the  icon (if one appears) to see list of direct reports



4. Extend the Functionality

- Demo extended manager self-service functionality (drilldown)
- Demo data entry page



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5. Market ERP

- Integrate news, metrics, targeted content to.....
 - Promote classes
 - Encourage usage
 - Share knowledge
- Your portal is a perfect front door to engage your users with your “new” self-service



5. Market ERP

- Publish “PeopleSoft” events in your “portal”

Top Story



Fall 2008 Grades Posted!

Grades from the fall semester of 2008 are now posted. Your grades will be listed under your secret alias to protect your privacy. View this news story and click on the URL link to launch the grading system.

[Read more](#)

Next: [Alliance / HEUG 2009](#)



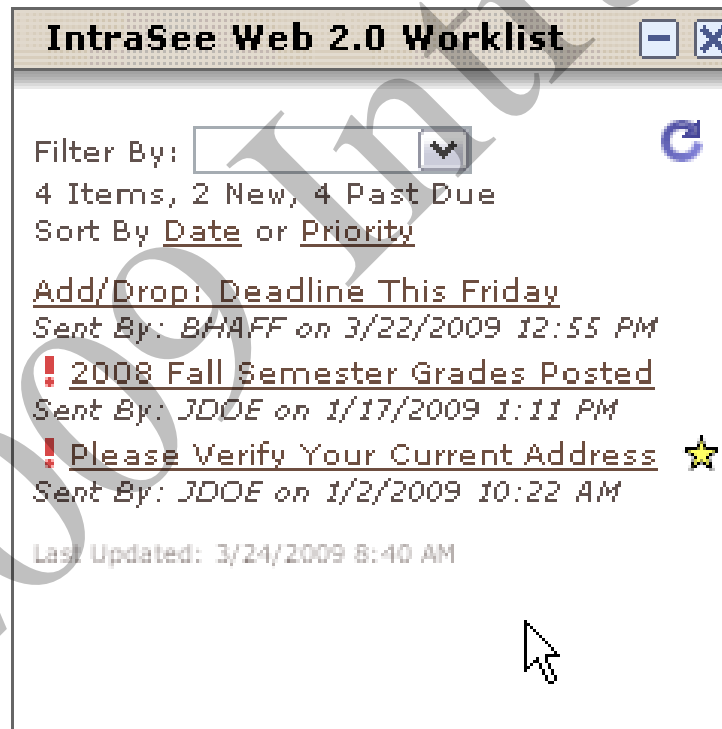
Alert: [Storm Warning in Cincinnati](#)

[Show News Sections](#)

[Submit Article](#) | [Update Submitted Articles](#)

5. Market ERP

- Publish “To Do’s” on the “portal” home page





5. Market ERP

- Demo Rotating News for Marketing



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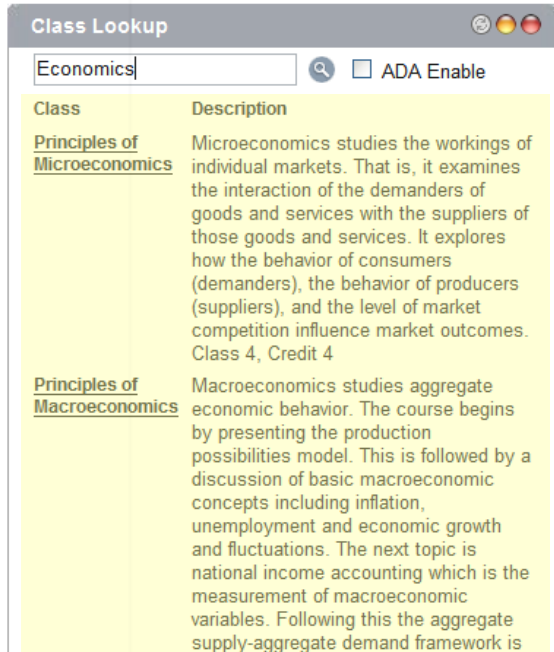


Technology How To

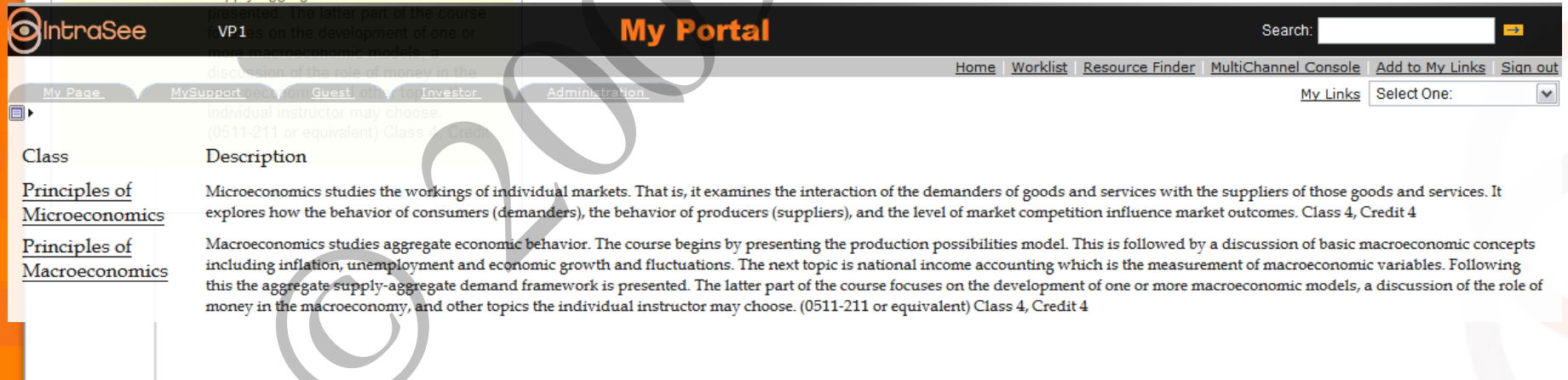
- Use XSL library and HTML based objects in the Pagelet Wizard to skin PeopleSoft components
- Use iScripts combined with XSL library to transform output to Web 2.0 standards
- Use a wizard tool to combine applications into processes
- Use your portal to integrate marketing with your ERP
- Ensure consideration of ADA requirements
 - You can “flip” the XSLT depending on the requirements of the viewer
 - XSLT allows for easier ADA compliance

ADA – How To

- Pagelet either renders HTML in a pagelet – AJAX style
 - Yellow background quickly fades away
- Or pagelet transfers to another page and renders the same HTML on a different page – Static style
- User selects the style they want
- The delta effort to support two styles?
 - One line of code



Class	Description
Principles of Microeconomics	Microeconomics studies the workings of individual markets. That is, it examines the interaction of the demanders of goods and services with the suppliers of those goods and services. It explores how the behavior of consumers (demanders), the behavior of producers (suppliers), and the level of market competition influence market outcomes. Class 4, Credit 4
Principles of Macroeconomics	Macroeconomics studies aggregate economic behavior. The course begins by presenting the production possibilities model. This is followed by a discussion of basic macroeconomic concepts including inflation, unemployment and economic growth and fluctuations. The next topic is national income accounting which is the measurement of macroeconomic variables. Following this the aggregate supply-aggregate demand framework is



IntraSee My Portal

Search:

Home | Worklist | Resource Finder | MultiChannel Console | Add to My Links | Sign out

My Page | MySupport | Guest | Investor | Administration

My Links | Select One:

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Technology How To: Pagelet Wizard

- Delivered in PeopleTools 8.46 onwards
- Enhanced in PeopleTools 8.48

Pagelet Wizard

- Pagelet Wizard
- [Define Data Types](#)
- [Define Display Formats](#)
- [Define Transform Types](#)
- [Define Headers](#)
- [Define Footers](#)
- [Define Categories](#)
- [Define XSL](#)
- [Delete Pagelets](#)
- [Copy Pagelets](#)
- [Export/Import Pagelets](#)
- [Review Pagelets](#)
- [Define IB Connector Security](#)

Pagelet Wizard
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search by: begins with

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)



Technology How To: Pagelet Wizard - XSL

- Pagelet Wizard
 - Pagelet Wizard
 - Define Data Types
 - Define Display Formats
 - Define Transform Types
 - Define Headers
 - Define Footers
 - Define Categories
 - Define XSL**
 - Delete Pagelets
 - Copy Pagelets
 - Export/Import Pagelets
 - Review Pagelets
 - Define IB Connector Security
- Email / Calendar
- External News
- Internet
- Promotions
- Web Magazine
- User Personalization
 - Publish Pagelets
 - Configure Homepage
 - Content Pagelets
- Resource Finder
- Workspaces
- Site Management
- Menu Item Requests
- Survey
- Instant Messaging
- Account Sign On
- System Data
- Test

Define Pagelet XSL

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

[Add a New Value](#)

Search by: XSL Prototype Name begins with

[Search](#)

[Advanced Search](#)

Search Results

[View All](#)

First 1-48 of 48 Last

XSL Prototype Name	Data Type	Description
GOOGLE API	SOAP	GOOGLE LIST
ISEE RSS2 ROTATING	URL	Rotating RSS News
IS AJAX CALENDAR	COMMUNITY_CALENDAR	AJAX Calendar
IS AW FTS	NAVIGATION_COLLECTION	AW Follow These Steps
IS AW FTS UL	NAVIGATION_COLLECTION	AW - Follow These Steps - UL
IS INTERACTIVE DISCUSSIONS	IS_DISCUSSIONS	Interactive Discussions
IS INTERACTIVE DISCUSSIONS Q	INTERACTIVE_DISCUSSIONS	Interactive Discussions Query
IS_NC_MENU	NAVIGATION_COLLECTION	IntraSee Menu
IS_ROTATING_NEWS	NEWS_PUBLICATION	Rotating News with AJAX
LIST_QUERY	PSQUERY	Bullet List
NAV_SMALLIMAGES	NAVIGATION_COLLECTION	Small Images
NUMBERED_LIST_QUERY	PSQUERY	Numbered List
PAPP_ACTION_ITEMS	ACTION_ITEMS	Action Items
PAPP_COMMUNITY_CALENDAR	COMMUNITY_CALENDAR	Community Calendars
PAPP_CWLINKS	CWLINKS	Collaborative Workspace Links



Technology How To: HTML

Pagelet Wizard

Step 2 of 6



< Previous

Next >

Select Data Source

Select the type of data and specify the source which contains the data you want displayed in your pagelet.

Calendar of Events (AJAX)

'Data Type'

Description

The HTML data source allows you to specify HTML code which you would like displayed in your pagelet.

Data Source

'HTML Text:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<HTML>
<HEAD>
<TITLE> New Document </TITLE>

<script type="text/javascript" language="javascript">
```

Save

Notify



Technology How To: iScript

- PeopleSoft server side scripting language
 - Think JSP/PHP for PeopleSoft
- iScript can use HTML objects containing
 - Javascript
 - HTML
 - Even CSS
 - PeopleCode built-in function called TransformEx takes XML and XSLT and transforms that to HTML
- Merges PeopleSoft data (which can be XML) with HTML
- Advantage of being
 - Able to natively access all PS functions and App Packages
 - Your PeopleSoft development team know how to develop in it
 - Uses your current infrastructure!
 - No new servers to maintain
 - Efficient and scalable





The Result

- **Software that looks and behaves as if it was built in the past 18 months, and not 10 years ago**
 - Project an image of relevance
- **Software that people intuitively know how to use and enjoy using**
 - Less help desk calls
 - More usage
 - Positive buzz
 - Your users may Twitter about you in a good way!



More Information

- **Contact:**
 - Paul Isherwood (paul.isherwood@intrasee.com)
 - Andrew Bediz (andrew.bediz@intrasee.com)
- **Go to the IntraSee web site**
 - <http://www.intrasee.com>



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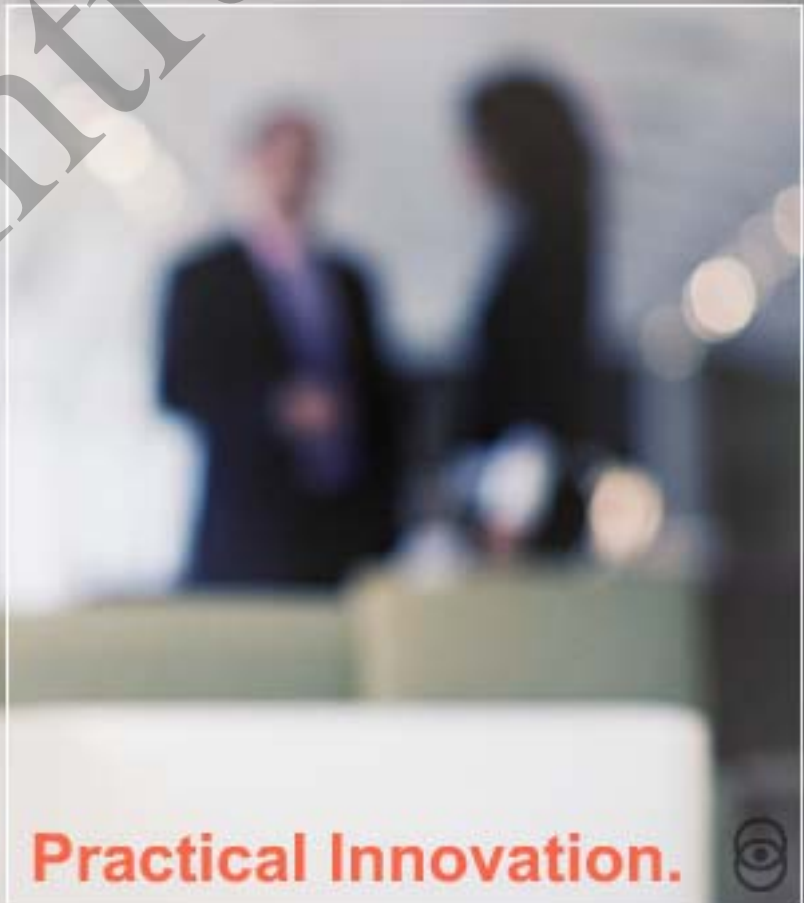
Questions?

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Practical Innovation.

