PeopleSoft Success: PeopleSoft Portal Creates Great Self Service Solutions

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The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Program Agenda

• Portal’s Place in the PeopleSoft Ecosystem
  – What forms the ecosystem
  – Portal’s value and place in the ecosystem
  – Web sites focus, not applications

• Southern Co.’s Portal – Contemporary Self-Service User Experience

• The Future of PeopleSoft Applications Portal
  – New feature demo
  – Plus other related pieces of the ecosystem
The PeopleSoft Ecosystem
Applications Portal Then and Now
Strategy Based on Current Trends

Originally:
A Conventional Aggregator of Content

Present/Future:
Comprehensive Enterprise 2.0 Platform
Portal and Other Features Working Synergistically

Three key features of Portal:
- Aggregation
- Content
- Collaboration
Demonstration—Southern Co.
Southern Company
Electric Utility in the Southeast

26,000 employees (phase 1 portal target audience)
  - Over 9,000 field workers
  - 95% work in Ga, Al and Gulf Coast

Implemented PeopleSoft HRMS in 1994
  - Help Desk (CRM) - 2005
  - Experienced PeopleSoft support staff

HR Website Launched in 1999 (home grown)
  - Outdated technology and design
    - Link farm, inefficient search, navigation layers,
      business terminology, little ESS/MSS adoption
mySOsource Delivery Strategy
Rebranded to drive change/consistency

Provide an online workforce gateway, with a consistent look, feel and navigation, to information/resources where employees can:

- **Personalize** their experience thru custom views
- **Receive relevant** information (target content based on job, company, location, etc.)
- **Engage and collaborate** with other employees for information sharing and interactive learning
- **Review and update** employee information including upcoming training and open job postings
- Research workforce needs leveraging **expanded search** capabilities (Web 2.0) to improve results matching, as well as **process search** feature, “How do I…”

*Easy to Use, Engaging, and Decentralize Input*
mySOsource – Easy to Use
Deliver capabilities employees see in external websites

Improve Online Delivery of Information & Services
- Resemble best practice websites
- Training Required --- sales/banking internet sites?
- Minimize pop-ups/new windows (consistent SS delivery)
- Communicate linking to External Site

Improved Searching Capability
- Auto-suggest
- Learn from others
- Suggest additional content/frequently used

Increase Engagement in work life/Benefits
- Silent Authentication - Hewitt, Merrill Lynch & Optum Health
- Deep linking
mySource – Easy to Use
Consistent look to employee self-service

Employees no longer have to understand which application certain tasks are completed in; the portal provides a consistent look and feel regardless of the source application (HRMS, Case Management, Time & Attendance, etc.). Leveraging web 2.0 capabilities ESS is rendered in the same window reducing confusion.
mySOurce – Engaging
Implementation does not signify the end….but the beginning

Leverage information available for Personalization
- Me at a Glance, My Department at a Glance
- News

Provide Holistic Employee Website vs. HR Centric
- Inclusive workspace
- To Do List (Course, Expense, Invoice, Security, etc..)
- Payroll, Wellness, etc.

Targeted Content
- Role-based through HRMS integration
- Calendar
- New Employee Checklist

Perpetual Beta
mySOurce – Decentralized input
Implementation does not signify the end….but the beginning

Introduce Collaborative Learning platform

- Learning Videos
- Collaborative Learning/Knowledge Sharing

Multi-generation Appeal

- Online Chat & email with HR Direct service center
- Feedback / Rating Content
- Content Categorization (Tagging)

User friendly content tools for Authoring

- Increased participation/ownership of content

Direct Access to Information

- Improved visibility and capability
mySOcre – Project Details

Not just a technology implementation

10 month implementation
- Redesign of all business content – 2500+ items (Technology implementation closer to 6 months)
- PeopleSoft Enterprise Portal selected
- Over 30 Focus Groups

Partnered with Intrasee
- 2.5 external resources
- Instrumental in overall design
- Experienced with self-service capabilities

End Result
- Improved Self-Service Capability – (SSO, HDIs, Chat, To Do List)
- Engaged workforce – 95% of employee population accesses monthly
  - Positive feedback daily
- Reliable platform – excellent performance to date
mySOrce Home

Self-Service Options
- How Do I’s
- Me at a Glance
- My To Do’s
- Chat
- Create Online Case

100+ Roles for Targeted Content
- News Articles
- Calendar of Events
**mySOunce – How Do I**

Targeted Help on over 250 business processes

How Do I Change My Address?

**Summary:**
This process allows you to change your home and/or mailing address where it is stored in the SHIPS database.

**Details:**
- Your SHIPS records contain both a home address and a mailing address. These addresses can be the same or you can show a different mailing address.
- Access the SHIPS Home and Mailing Address Form to edit/update your home address, mailing address or both.

**Did You Know?**
To have your paycheck mailed to a different address than your mailing address, call the Payroll Helpline (1-877-762-6729) select option # 4

**Related How Do I’s**
- Change (add) my Phone Number
- Change my Emergency Contact
- Change my Marital Status

**Auto Suggest**
Search Text

**Embedded ESS**

**Related HDIs**
- Provides additional related business processes

**Did You Know(s)**
- Random display of additional facts

**Most popular HDIs**
- Page specific
mySOunce – Access to HR Service Center

Two additional channels delivered

Establish internal service center relationship – rotating pictures

Online Help Desk case creation – PeopleSoft HR Helpdesk (CRM)

SSO with Chat vendor – real time communication
mySOurce – Me at a Glance
Contains only information about the employee (role based delivery)

Easy access to personal information, one click to update
• Eliminates deep navigation
• Eliminates confusion with launching another application
• Delivers instant confirmation the change was successful
mySOnce – Me at a Glance
Contains only information about the employee (role based delivery)

- Benefit vendor contact info – specific to employee elections
- Consistent interface to Time & Attendance for ESS
- SSO with deep linking into vendor hosted functionality
- Eliminates additional login
- Eliminates navigation
mySOsource – My To Do’s

Consolidated work list capability

Integration with multiple solutions:
- LMS – pending training
- Expense approvals and notifications
- Invoice approvals
- Multiple HR related transactions such as cash awards, tuition reimbursements, status changes, promotions, etc.
- More in progress

Includes both HR and non HR related action items
Benefits Home

- Consistent branding across site (top/Left side)

- Content categorized in employee terms

- Focus on retirement due to industry wide aging workforce

- SSO to vendor providing policy details

- Role based delivery displaying content based on eligibility.
SSO and deep linking allows for ease of use for employees (one click access)
Money & Finance Home

- Consistent branding across site (top/Left side)
- Easy access to Employee self-service
- Similar Did you know feature specific to pay
- Role based delivery displaying content based on eligibility.
Career & Development Home
- Consistent branding across site (top/Left side) Additional ESS available in left pane for easy access
- Integration to external learning vendors, SSO for easy access
- Over 60 web pages providing details on career growth and development
- Images focus on resembling our workforce
SouthernLifestyle

• Health and Wellness is a priority

• SSO to vendor providing consulting support on health topics

• Employee self-service options, consistent look and feel as all others. (Sign up for Lab Draw seen below)

• Role based delivery displaying content based on which company/state you work for/in.
Managers Home

- Consistent branding across site (top/Left side) with added ability for MSS

- Increased emphasis on manager self service. No need to launch another solution, data is readily available. Consistent look and feel to ESS.

- Categorized content into business process buckets (employee’s terminology)
New Employee Home

• Website specifically targeted at incoming employees to assist with important tasks that should be completed within the first 6 months of employment

• Role Based Content
  • Each business unit has a different check list
  • Over 30 leadership messages based on the employee’s organization
  • Access automatically removed after 6 months

• Checklist capability stores employee’s progress

• Checklist links directly to ESS
mySOfource – Feedback
95% of feedback was extremely positive

Nicely done! So easy to navigate and easy on the eyes. Can’t wait for the “chat” feature. And the Manager tab makes SO much more sense now! Just wanted to let you know how excited I am about the changes -- Congratulations! Vice President

Excellent website! It's great to be able to reach so many of our benefits with one click. Plant Construction Specialist

I LOVE the new website. It is much easier to find items on this website. Love how it is laid out in categories!!! Awesome job. Thank you so much. Service Consultant

Just a line to say 'you guys' have finally hit the winning combination!!! This new WEB Portal is sooooo easy to use and makes every request / transaction a breeze... No having to look to find the portal to go to STARS Benefits or Company Savings / retirement info - everything you need is on the Main Page and so easily accessible...Kudos to all that had input and WEB page design!!! This new portal will make life easier for the employees and on you guys also... Thanks for a Great / Outstanding WEB Portal!!! Field Technician

Congratulations on the launch of mySOfource!! It’s a great tool and will set the bar for other portals to follow. THANK YOU for leading the innovation to make us more productive. Projects Director

I like the efficiency of mySOfource - especially how it combines all the main login portals on its main page where they're easy to access. Engineer
Where Are We Going?
Future of the Applications Portal

Themes

Primary Focus: Make it easier to deploy portal in the ecosystem

- Simplifying multi-application setup and unified navigation
- Easier deployment and administration of Portal, including branding, and constructing the user experience
- Robust and integrated search on content and application transactions
- Simplifying and contextualizing the use of content with business processes/applications.
- Provide related service based on Portal features

We will continue to provide and enhance collaborative, Enterprise 2.0 capabilities as well!
Future Portal and Ecosystem Features

Upcoming Feature Packs

- Simplified setup for unified navigation for PeopleSoft Applications
- Improved Search aggregation
  - Search SES for all features in portal, workspaces
- Action items
  - Ability to initiate PeopleSoft transactions and processes from Action Items
  - Hierarchical action items
- WorkCenter framework
- Tagging capability in PeopleTools (throughout PS ecosystem)
- Contextualization and tracking
- WorkCenter for publishing Managed Content
- Related Attachment service
- Related Content enhancements
- Workspaces
  - Multiple Wikis for a Workspace
  - Workspace-Calendar to render all schedule/event types including action items, tasks, etc.
- WebCenter Services integration in PeopleTools
- Branding Framework and personalization
- UE improvements for pagelets
Demonstration—Upcoming Features
Feature Packs will enable Oracle to deliver solutions to customers faster. This should also make updates easier to adopt, and lower the impact of change.
Feature Packs Aligned with PeopleTools Releases

- New features in feature packs will take advantage of latest tools capabilities
- 9.1 customers, there is no requirement to use the features that are dependent on current tools
More Feature Pack Release Information

• Feature Pack 1 will require PeopleTools 8.50 for existing 9.1 customers. The Feature Pack can be applied on 8.50, 8.51, or 8.52, and will contain enhancements and fixes. Customers on PeopleTools 8.50 and 8.51, will not be able to use the enhancements that require PeopleTools 8.52.

• Direct upgrade paths for Portal customers currently using 8.9 and 9.0, to get to 9.1/Feature Pack1. There is no upgrade required for 9.1 customers.

• A new install of 9.1/Feature Pack1 will be available on 8.52.

An example: If a customer is on release 9.1/FP 1 with Tools 8.52, they can take FP2 when it is released without upgrading to Tools 8.53. However, they would not be able to take advantage of Tools 8.53 features. If they upgrade to Tools 8.53, they will have the full complement of functionality.
More Information
# PeopleTools Sessions of Interest

## Monday

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<td>11:00</td>
<td>Improve ROI and Lower Costs by Mastering PeopleSoft Upgrade Tools and Resources</td>
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<td>Managing Your PeopleSoft Applications with Oracle Enterprise Manager</td>
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## PeopleTools Sessions of Interest

### Wednesday

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<td>PeopleTools Developer Series: Secure Coding Practices</td>
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# PeopleTools Sessions of Interest

## Thursday

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<td>PeopleSoft Answers: How to Enable PeopleSoft for Mobile Users</td>
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<td>PeopleSoft Success: Using the Related Content Framework to Empower Users</td>
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Learn More

*PeopleSoft Information Development Resources*

Hosted & Mobile PeopleBooks – PeopleTools PeopleBooks are available in three formats: Hosted PeopleBooks, PDF’s, and Amazon’s Kindle format. All can be accessed here:

http://www.oracle.com/technetwork/documentation/psftent-090284.html

Doc Home Pages – Constantly updated direct links to PeopleBooks, PeopleBook Updates, Release Notes, Installation and Upgrade Guides, and other useful product documentation, all accessible from one My Oracle Support location.

PeopleTools 8.52 Documentation Home Page [ID:1356456.1]

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=REFERENCE&id=1356456.1

Information Portal – Locate the documentation, training, and other info needed to help with your implementation process. Customers searching for this information should make this their first online destination.

Learn More

PeopleSoft Information Development Resources

Cumulative Feature Overview (CFO) – Providing concise descriptions of new and enhanced solutions and functionality that have become available starting with the 8.4 release through our latest 8.52 release. https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=SYSTEMDOC&id=793143.1

Upgrade Resource Report Tools – Helps you find all the documentation, scripts, and files you need for your upgrade project. https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=SYSTEMDOC&id=1117047.1
Hardware and Software

Engineered to Work Together