PeopleSoft Applications Portal and WorkCenter Pages

Creating a Compelling User Experience
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Executive Overview

Oracle has, for some time now, provided portal-like capabilities with their PeopleSoft applications and PeopleTools. This trend has continued with recent releases. With the limited use license of PeopleSoft Applications Portal that now comes with PeopleTools 8.50 and above, and features that were formerly part of Applications Portal that are now part of PeopleTools (for example, Pagelet Wizard), customers may wonder whether Applications Portal still provides sufficient value to justify a full license. This white paper describes the value and unique capabilities that Applications Portal provides beyond those PeopleTools and applications features, and why it is still a viable option for many PeopleSoft customers. We also describe some WorkCenter pages, which come with PeopleTools, and which can also enhance the PeopleSoft applications user experience.
Introduction

The PeopleSoft Applications Portal can serve as the gateway to your enterprise or the rest of the world. There are three main benefits that Applications Portal provides, all of which contribute to an enhanced experience for your user communities:

- Seamless and simple integration of PeopleSoft applications content
- Content management
- Web 2.0 and collaboration—at all levels from small groups to the entire enterprise

Many customers have realized value in these and other areas, employing the PeopleSoft Applications Portal as a framework for aggregating PeopleSoft and external content and as a means to enhance the overall experience of their PeopleSoft applications. The most common example of this is for HR self-service. But Applications Portal is used in different ways by a variety of customers in many commercial industries, public sector companies, and educational institutions.

Applications Portal also supports the ability to organize useful information by business process, and present it in a user-friendly way. It can bring useful supplementary information into the context of transactions, improving efficiency.

Additional advantages of the PeopleSoft Applications Portal include low total cost of ownership, and the same familiar and mature platform on which PeopleSoft applications run. Your employee skill sets transfer. Applications Portal also provides a large body of APIs for extensibility.
Creating a Better User Experience

In addition to delivered functionality, Applications Portal offers some features that enable customers to craft a better experience for their users. These include, but are not limited to the following:

- Applications Portal supports common standards, which enable these advantages:
  - Use of open source UI components like jQuery so that you are not constrained by what Oracle delivers.
  - Use of common web design methods such as CSS to stylize delivered PeopleSoft objects like navigation collections and pagelets.
  - Ability to stylize content significantly without changing core portal services. Portal content services (for example, calendars, news publications, and so on) separate content from the UI. Therefore, content is served in XML, and then XSLT is used to render it.

- Once the initial user interface has been implemented, everything beyond that can be done as configuration. Build once, configure from then on.

- Applications Portal can bring together an Oracle solution: Oracle Business Intelligence plus WorkCenter pages plus Applications Portal content services coming together for a total solution meeting a variety of needs of a multitude of users and communities.

User Experience Possibilities

A great user experience with Applications Portal is both art and science. With some straightforward web design, branding, and configuration, organizations can create a role-based self-service platform that can aggregate information from various sources, both PeopleSoft and external content. This enables users and communities to accomplish
day-to-day and self-service tasks without having to navigate extensively in enterprise applications.

The following are some examples of what can be done to create a compelling user experience with Applications Portal. These types of implementations can be accomplished with configuration and style sheet manipulations—without customizations and PeopleCode changes.

Self-Service Home Pages
One of the most common scenarios for implementing Applications Portal is to deploy self-service pages. Here are some examples of what can be accomplished with straightforward and simple design. These examples illustrate the following conditions:

- No PeopleCode changes made.
- Rotating news images are linked to news publication articles. Clicking on an image opens the article in a lightbox window.
- The navigation on the left is a navigation collection, restyled and linked to a jQuery library to animate the accordion action of the links.
- The Human Resources News pagelet is a Pagelet Wizard pagelet for an HR news publication, restyled via XSL and CSS. The same is true of the HR Events calendar, which is built as a Pagelet Wizard pagelet from a community calendar.

Applications Portal content services like news and calendars serve content as XML, and then XSL is used to turn it into HTML. In this case, the XSL was changed, and some additional styling performed in CSS.

- The Company Directory link opens the enterprise organization chart in a new window.
• The *Leave Summary* is an HCM Portal Pack pagelet, restyled using CSS. The original HCM definition remains unchanged.
Here is the same page with an accordion navigation collection link section (*my Personal Information*) expanded:
This page illustrates how to define the navigation collection with the same folder (*my Personal Information*) expanded. You make changes like any other navigation collection:

Configurable objects like navigation collections can be completely transformed with a little web design work. Once you’ve done an initial installation and design, you need not be bound by standard, out-of-the-box arrangements. There is great flexibility available when designing the user experience.
When you click a link in the navigation collection, the target is opened in a jQuery lightbox window:

![jQuery Lightbox Example](image)

Once the initial portal design is done, it can be changed easily and kept up to date through configuration. For example, data like personal information can be edited by end users (through role and access awareness), even if they do not have web design skills. In addition, content like wikis, blogs, calendars, and news can be easily updated by subject matter experts without the assistance of IT.

Content owners can edit items in-line with a simple Edit link. This opens a full-featured, rich text editor for creating and modifying content.
WorkCenter Pages

WorkCenter pages are template-based portal-like products that are available with PeopleTools. WorkCenter pages provide a more streamlined user interface that reduces the need for navigation, increases productivity by providing a central place from which the day-to-day work can be accomplished. WorkCenter pages can be constructed for a variety of roles. PeopleSoft applications will deliver pre-built WorkCenter pages in future releases, but customers can create their own as well, using the capabilities provided in PeopleTools.

WorkCenter pages are role-based employee-facing portals for users in specific roles. For example, WorkCenter pages for accounts payable clerks, managers, and supervisors, offer a central place to do their day-to-day work, where all related transaction pages, search pagelets, and analytics pagelets are available in one central location. The transactional page is included as part of the WorkCenter page, so users do not have to navigate away from the page to execute tasks.

The following diagram illustrates how WorkCenter pages can enhance the user experience of applications and attendant utilities:
Benefits of WorkCenter Pages

In the real world today, users must navigate between multiple pages, and multiple open windows in order to complete a task. Moreover, they are often interrupted in their work with inquiries from management, customers, or suppliers, while managing a list of tasks on paper, in email, and so on.

WorkCenter pages can integrate all pages that users need to access in one location. Users see all relevant information at a glance, providing a complete picture of their work. By organizing all relevant information pages and reports in one location, organizations can be more efficient and effective.

WorkCenter pages eliminate the common challenges of conventional applications:

- Numerous steps to navigate between pages.
- Multiple windows open to get the job done.
- No efficient way to manage job interruptions (inquiries, ad hoc report requests, and so on).
- Tasks managed on paper, in email, and in other applications.
- No central place to see the “complete picture” of the job.
**Process WorkCenter Page**

The following is an example WorkCenter page that illustrates the benefits described above. The first example is typical of a manager’s dashboard, in which the user’s processes start with business intelligence. This shows an OBI dashboard set up in a WorkCenter page. No customization is needed to OBI to enable the WorkCenter page. The main target area is straight from OBI as a URL.

Task navigation on the left is a navigation collection. Recruiter Alerts is a pagelet. Both areas are styled using CSS.
The following example uses the WorkCenter tasks to navigate to a component, but notice that the application content is brought into the context of the WorkCenter page:
Users can configure their WorkCenter pages, changing pagelets and tabs:

Valuable Features of the Applications Portal

Although there are some portal features available to customers just by licensing PeopleSoft applications and PeopleTools, there are many features that are only available with an Applications Portal license. The following Application Portal features combine to provide a richer and more compelling overall user experience:

- Unified Navigation – A common and consistent navigational experience for multiple PeopleSoft applications, maintaining context as users navigate between applications and across business processes.
• Site Management – Central administration of portal sites, providing role-based access provisioning and presentation of content as well as branding.

• Portal and Site Branding – An attractive look and feel that is intuitive, and reflects the unique branding, presentation, and appearance that each enterprise or institution would like to display to its communities. An enterprise’s brand is important. Branding can even be varied and unique across divisions, regions, campuses, and so on, all within a common theme.

• Full Content Management and Publication – The ability to push content to large parts of the organization or the complete enterprise. You can publish company news and other valuable information to wide audience, which engages the workforce. You can use wiki-style content management and editing (with a familiar rich text editor) that supports content creation from many community members – the community builds rich content for your portal. The content management system supports merging content from multiple applications and varied users.

• Portal Search – Search across multiple applications, in a role-aware manner. People can find what they need.

• User Experience – Better navigation with intuitive, elegant visual cues, including navigation collections, with reduced reliance on extensive menus. More interactive interface, not static.

In addition, many collaborative features, including collaborative workspaces, are available with PeopleTools through the limited use license of Applications Portal. However, the scope is much broader with a full Applications Portal license, and may extend beyond departments and project teams to reach the entire enterprise audience. The following features are only available to an enterprise-wide audience with a full license:

• Portal Discussions – Engage the entire user community, and can be moderated.

• Portal Blogs – Are useful for disseminating information to the portal community. Published by individuals or teams, portal blogs are full-featured and easy to use
with rich text editing and images. Portal blogs can be multi-threaded with comments and moderation while individual posts can be tagged for easy association to other content. You can publish feeds on blogs, so users can easily follow them. Blogs can be public or restricted by PeopleSoft role-based security.

- Portal Action Items and Community Calendars – Support community collaboration and task management.

- Surveys and Polls – Provide enhanced participation and engagement of user communities. The results give greater understanding of the needs and viewpoints of the enterprise population.

- Tagging – Provides a means for social bookmarking. The user community associates and categorizes content in ad-hoc ways without hard-coding, creating “folksonomies.” The full Applications Portal license allows tagging of third-party application content as well as PeopleSoft content.

Common PeopleSoft Platform
Applications Portal is built on and runs on the PeopleTools platform—just like other PeopleSoft applications. This provides for a common security model, and enables easier integration of Applications Portal and applications as well as provisioning and access across your PeopleSoft portfolio.

Conclusion
PeopleSoft Applications Portal provides not only content aggregation, but many functional capabilities that are particularly useful in a PeopleSoft-centric environment. It is especially valuable in integrating PeopleSoft application content and unifying navigation across applications. Applications Portal provides broad deployment of Enterprise 2.0 capabilities that can improve the effectiveness and efficiency of organizations. WorkCenter pages are used to streamline the day-to-day work of a variety of roles, providing greater effectiveness and efficiency.