

# **Building Adaptable Business Processes with Electronic Forms: Decentralized Hiring**

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# Your Presenters

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**Paul Taylor**

Technical Consultant  
PeopleSoft HCM Upgrade



**Alisha Steere**

Assistant Product Manager  
PeopleSoft HCM Upgrade



# Current PeopleSoft Status

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eForms is being implemented at BYU in the following environment:

- HCM 7.5 to 8.8 upgrade - goes live April 5<sup>th</sup>!
- Financials 7.5 to 8.8 upgrade - in progress
- PeopleTools 8.44
- HP-UX, WebLogic, Oracle 9i



# What We Will Cover

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- eForms Vision
- eForms Reality
- eForms Concepts



# What We Will Cover

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- **User Benefits**
- **Business Analyst Benefits**
- **Developer Benefits**
- **Technical Tools Tour**



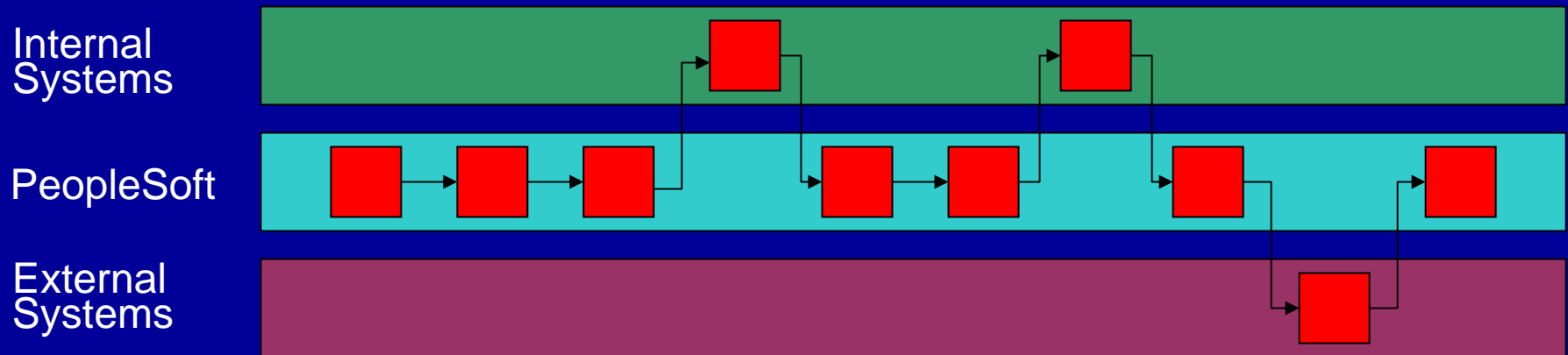
# eForms Vision

**Envisioning an  
Adaptable Business  
Process Framework**

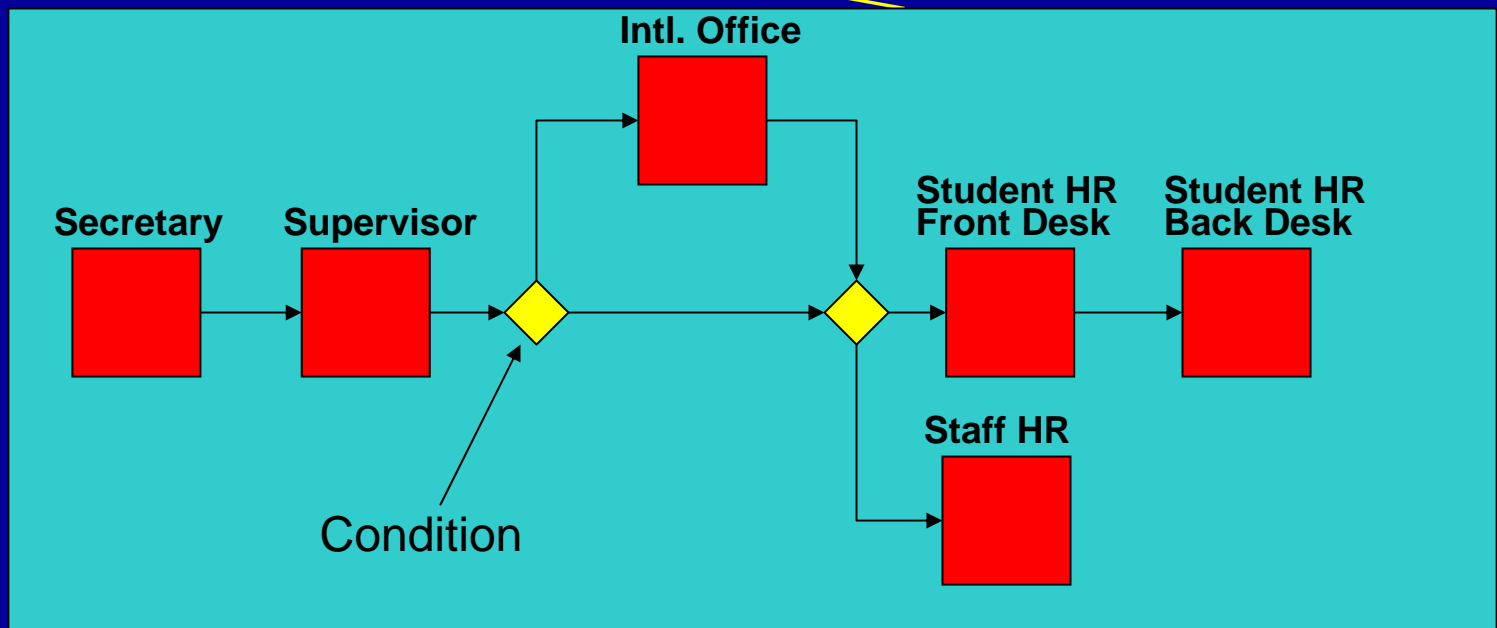
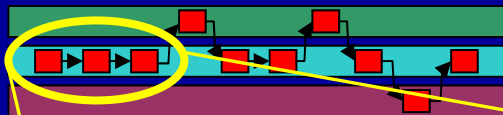


# PeopleSoft's Vision of the Adaptable Business Process

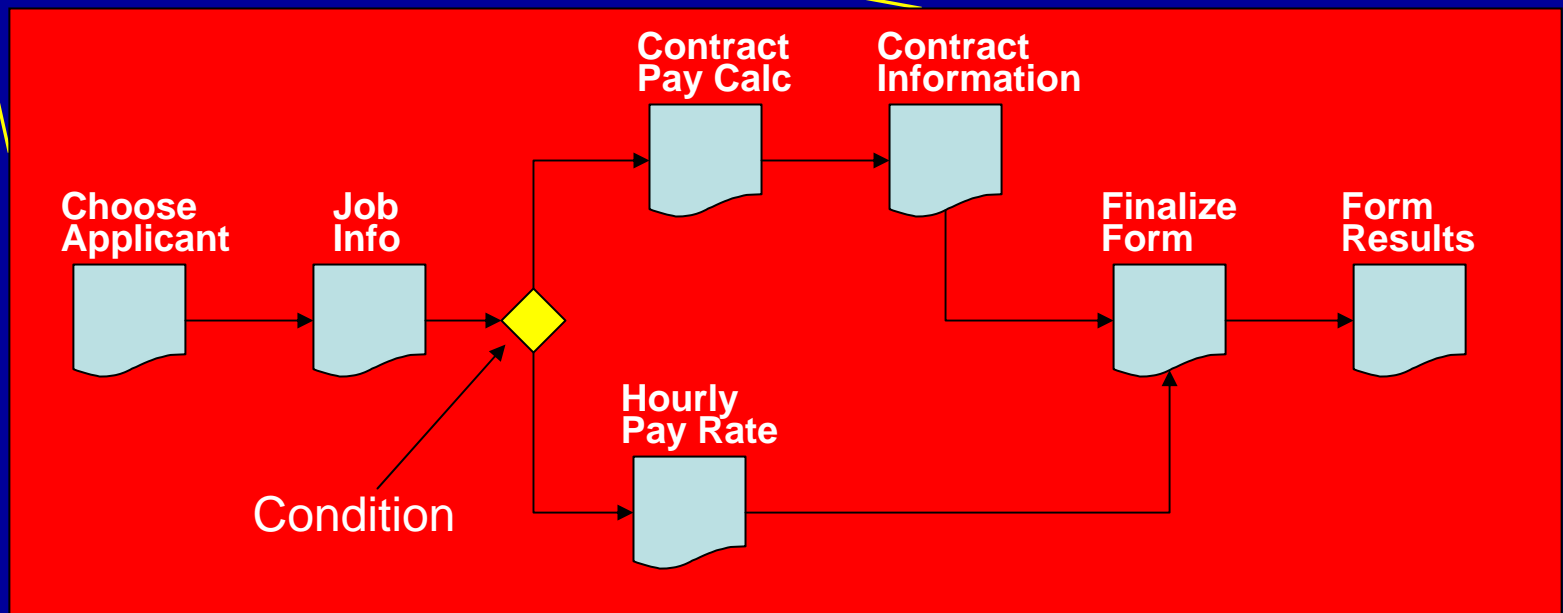
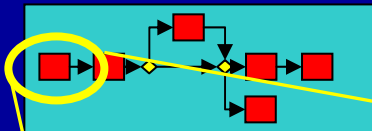
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# Conditional Business Process Flow Across Participants



# Conditional Business Process Flow Across User Steps/Pages



# Introducing the Business Analyst

A Business Analyst is:

- *An expert on the business processes of the organization*
- *A power user, but not a developer*
- *Authorized to supervise and change business processes*



# An Adaptable Business Process Framework Will...

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- Expedite process flow across, into and out of the system
- Allow conditional branching on the participant level
- Allow conditional branching on the user step level
- Allow a Business Analyst to manage and change the flow and presentation of the process



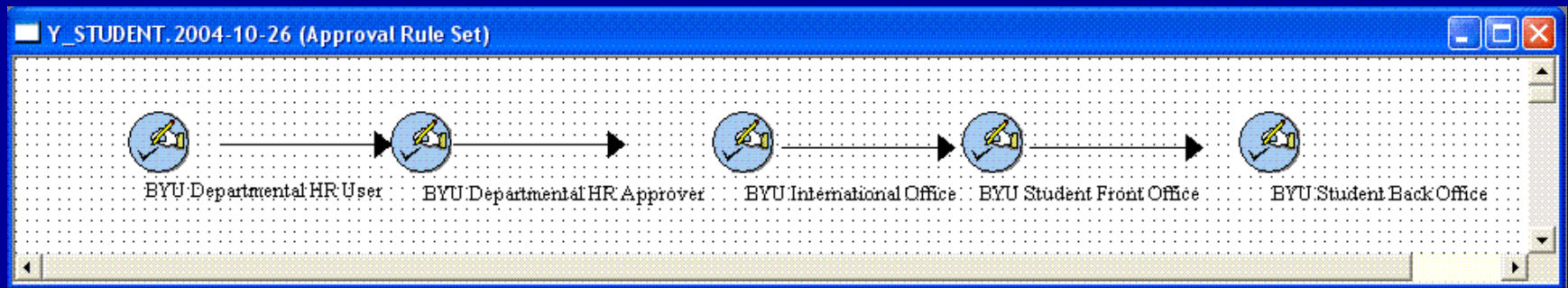
# eForms Reality

**An Adaptable Business  
Process Framework in  
Action**



# Flow Across Participants: Hiring a Student Employee

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# Live Demo

## Hiring a Student Employee



# How Did eForms Do?

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- ✓ Expedited process flow from form entry to execution
- ✓ Conditionally involved participants
- ✓ Conditionally changed user steps
- ✓ Allowed a Business Analyst to alter the process

# eForms Concepts



# eForms Concepts

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- Each business process is a **Form Type**
- Form Types use **Approval Rule Sets**
- **Form Tasks** describe the purpose of individual steps in Approval Rule Sets
- **Task Steps** are the pages used to perform the task
- **Form Actions** describe what action the user performed to complete the task



# Form Conditions

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- **Form Conditions** allow for branches in the business process
- For each Form Condition of a Form Type, you can override the default:
  - *Approval Rule Set*
  - ***Email Notification Template***  
*associated with each Form Action*
  - *Task Steps*



# Form Conditions

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When a form is being worked by users, Form Conditions are changed programmatically based on the data, the environment, the user, etc. When the Form Condition changes, the system automatically finds the user's place in the new Approval Rule Set and stack of Task Steps.



# eForm Concepts

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The result is a framework that is:

- Extremely flexible
- Highly customizable
- Self-directing
- Navigationally cohesive
- Able to effectively represent and execute the actual business rules of the enterprise



# User Benefits



# User Benefits

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- **Email notifications with direct links to the forms**
- **Casual user interface**
- **Only see the fields they need to enter**
- **Interface unfolds naturally**
- **Don't have to wait for the system to do its work**
- **Access to form status and history**
- **Minimal training is needed**



# Business Analyst Benefits



# Business Analyst Benefits

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- Table-Based Management of:
  - *Form Types*
  - *Form Tasks*
  - *Task Steps*
  - *Form Actions*
  - *Form Conditions*

# Business Analyst Benefits

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- Email Management
  - *Easily create/update email text*
  - *Standard bind variables*
  - *Email template reuse*
  - *Embedded hyperlinks to form tasks*
  - *Embedded hyperlinks to defined URLs*



# Business Analyst Benefits

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- Standardized Form Management
  - *Form History standard across all forms*
  - *Easy to query*
  - *Easy to report from*
  - *Easily stop and start form entry into the system*



# Developer Benefits



# Developer Benefits

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- Conceptual Framework for Workflow Development
- SmartSpots – Condensed Coding
- Reuse:
  - *Worklist Record*
  - *Approval Rule Sets*
  - *Workflow Maps*



# Developer Benefits

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- Minimize Mods to Target Components
- Business Analysts Can Do Most of the Work!



# Technical Tools Tour

The Tools that Built  
the Framework



# Technical Tools Tour

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- **Virtual Approver**
- **Workflow Maps**
- **Asynchronous Messaging**
- **Component Interface**
- **Synchronous Messaging / Integration Broker**
- **PeopleTools-Enabled Non-PeopleSoft Databases**



# Technical Tools Tour

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- Object-Oriented PeopleCode
- iScripts
- Application Packages
  - *Component Interface Classes*
  - *StepStack Class*
  - *Form-Specific StepStack Classes*



# QUESTIONS?



# Contacts

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## Paul Taylor

Technical Consultant

PeopleSoft HCM Upgrade Project

Gideon Taylor Consulting LLC for

Brigham Young University

E-mail: [paul@gideontaylor.com](mailto:paul@gideontaylor.com)

## Alisha Steere

Assistant Product Manager

PeopleSoft HCM Upgrade Project

Brigham Young University

E-mail: [alisha\\_steere@byu.edu](mailto:alisha_steere@byu.edu)



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