Employee Portals

The First Strike in eBusiness Migration

A Case Study

Presented by:

Robert Geib
PeopleSoft Portal Solutions Team
4460 Hacienda Drive, PO Box 8081
Pleasanton, CA 94588
bob_geib@peoplesoft.com
925/694-2574

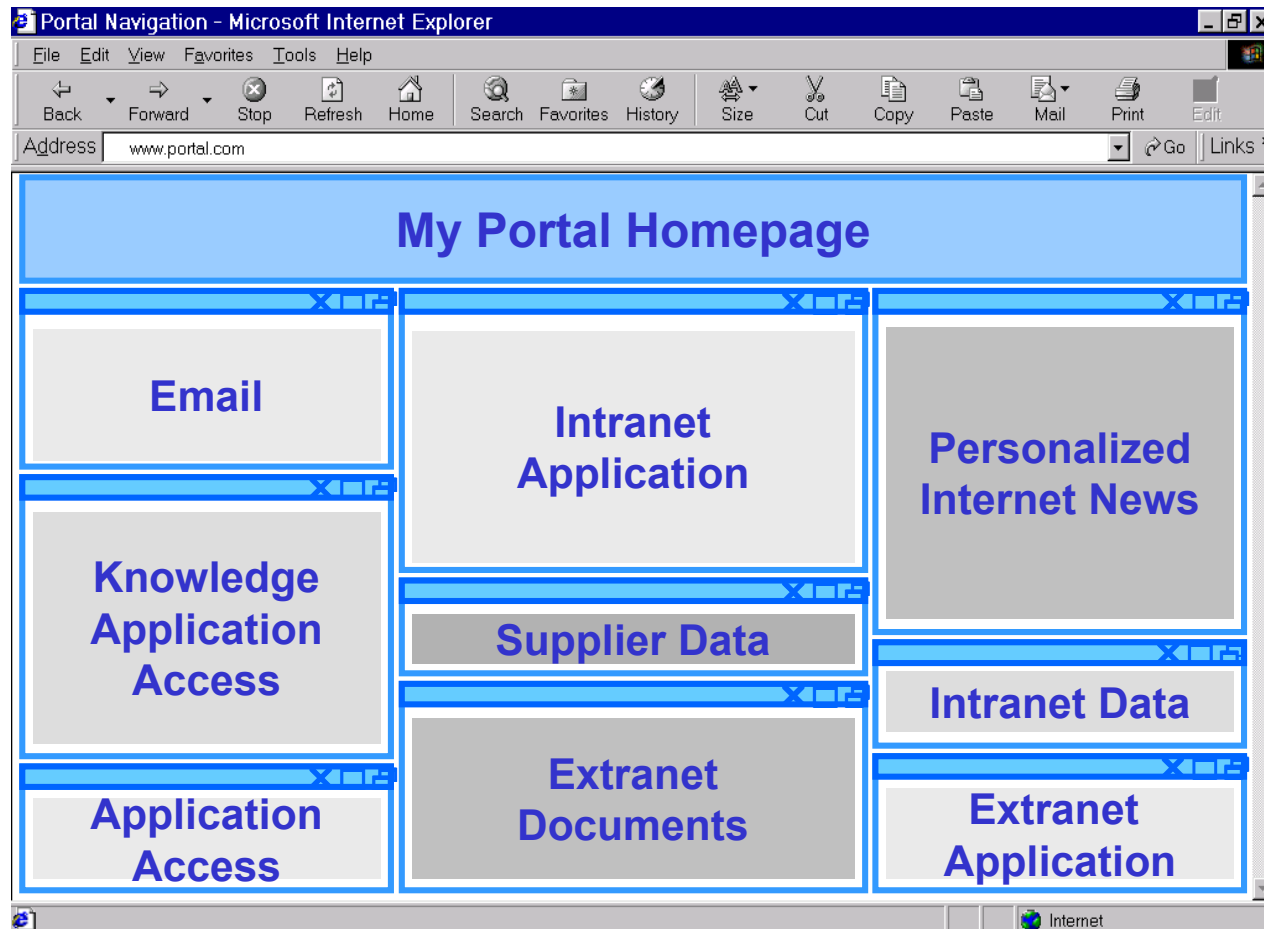# eBusiness is complex
Portals are the Tip of the Iceberg

The Portal Concept

- Portals aggregate content from all systems in the enterprise
  - Personalized
  - Relevant
  - Email
  - Alerts
  - Internet content
- Value add in eBusiness Apps
  - key to ROI
  - where work gets done
  - truly "sticky"
  - delivery of self-service

Portal Navigation - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

Back   Forward   Stop   Refresh   Home   Search   Favorites   History   Size   Cut   Copy   Paste   Mail   Print   Edit

Address   www.portal.com   Go   Links »

My Portal Homepage

Email

Intranet Application

Personalized Internet News

Knowledge Application Access

Supplier Data

Intranet Data

Application Access

Extranet Documents

Extranet Application

Internet

File   Edit   View   Favorites   Tools   Help

Address http://planet.peoplesoft.com/servlets/psportal/peoplesoft8/

BETA
myPlanet
PeopleSoft

Home | Map | Contact Us | PeopleSoft.com | Help | Sign

Customers | Employees | Suppliers
People power the internet.™

9:48 AM on Tuesday, 10 October 20

Personalization Role Based Content

Welcome Bob

Personalize   [Content]   [Layout]

Search:
Planet Peoplesoft
go

PlanetNavigator

View A-Z Listings | View Category Map

Expand All   Collapse All

▽ **About PeopleSoft**
Annual Report
Community Connecti
Community Kudos eC
Company graphic
E-Reports
Goodwilla Gorilla
Hats Off to You
Org Chart
People Programs
Raving Daves
World Wide Locations
▷ **Communities**
▷ **Customer**
▷ **Divisions**
▷ **Media**
▷ **Meetings**
▽ **My Info**
401K fund in   nents
Beneficiarie   d dependents
Benefits re   w (USA/Canada)
Canada H   & Benefits
Employee Stock Purchase Plan
Flexible spending accounts
International Assignments

Search

Navigation

Self-Service

Daily Planet
Formerly known as PeopleSoft Times   [Edit]

Web Publishing
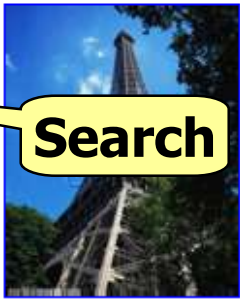
France's PeopleSoft 8 Launch Offers an Element of Success

PeopleSoft 8 was launched in science-fiction-spectacular fashion in Paris, France, Sept. 14. The launch played on the theme of movie "The 5th Element" starring Luc Besson and Bruce   In the movie, there are four elements: ea   fifth element is a woman coming to ea   PeopleSoft 8 Launch in Paris, our four   employees, suppliers, and partners. The   PeopleSoft 8, which has come to save the internet...more

PeopleSoft Headline News
• **PeopleSoft Wins! -- Brinks Increases Financial Security with PeopleSoft (October 06, 2000)**
• **Coming Soon! Deepak on CNBC (October 06, 2000)**
• **PeopleSoft Wins! Speaks to Innovative Communication Financials Needs (October 06, 2000)**
• **PeopleSoft Hires Industry Veteran to Lead M**

Click here to *Submit Article* Show me how!

Collaboration & Content Mtmt

Manager Dashboard
ManagerDashboard

Anniversaries
Pat Smith   10 yrs on 9/15/00
Simon Schumaker   5 yrs on 9/12/00

Birthdays
Joe Blow   /7/00

Analytics

Department PTO Report
Kate Schmoe   -40 hrs between 8/7/00 and 8/11/00

Alerts

PSFT 33.4375 -0.375   Mail   Calend

Employee Dashboard
EmployeeDashboard

Stock
Your stock options are worth **$50,000 USD** today. Click here for more details.

Payroll
An amount of **$3,500 USD** was deposited to your account on **7/31/00** for July's payroll. Click here for more details.

Expenses
An amount of **$500 USD** was deposited to your account on **7/31/00** for expenses you reported for **Users Conference**. Click here for more details.
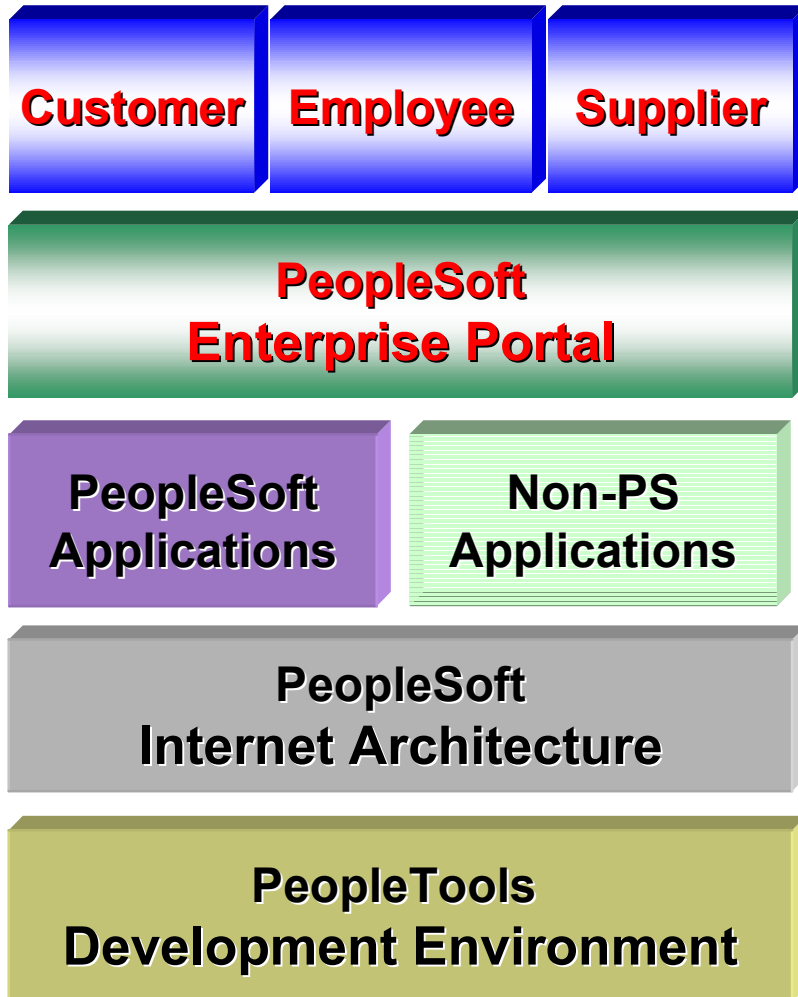
Benefits
TO   +160 hrs
FHO   +16 hrs
*New Aetna reimbursement policy

Calendar and eMail

Calendar

October ▼   2000 ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

Product Context for Solutions Delivery

Customer **Employee** **Supplier**

**PeopleSoft
Enterprise Portal**

**PeopleSoft
Applications**

**Non-PS
Applications**

**PeopleSoft
Internet Architecture**

**PeopleTools
Development Environment**

- Utilizing PeopleSoft's family of portal products.
- Role-based products (applications) with support of an underlying portal "engine".
- Required to leverage transactional information from eBusiness systems
  - From many vendors
- Leverage open architecture for internet
- Leverage existing development tools.

Vision of Employee Portal in Action

Manager
- Approve Promotion
- Procurement
- Approve Expenses

Sales
- Manage Contracts
- Resource Requests
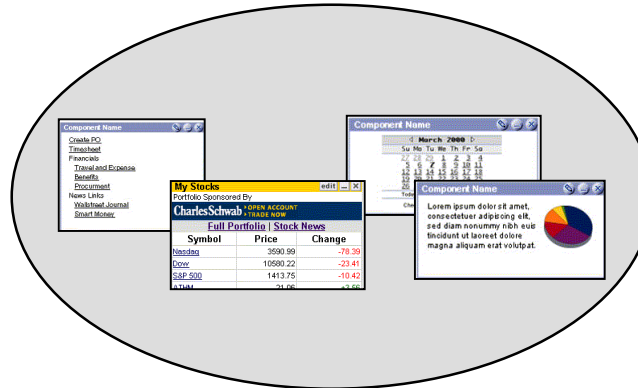- Customer Information

Optionee
- Stock Option Summary
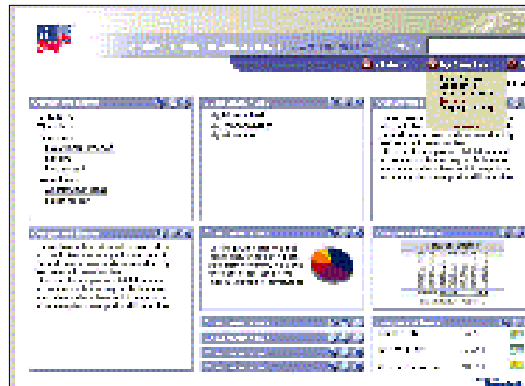- Issuance Instructions
- Purchase Activity

Executive
- Key Performances
- View Strategy
- View Scorecards

Roles-Based Employee Portal

Content Retrieval

Knowledge
- 3rd Party Content
- Suppliers
- Internal Info.

Data
- Employee Info
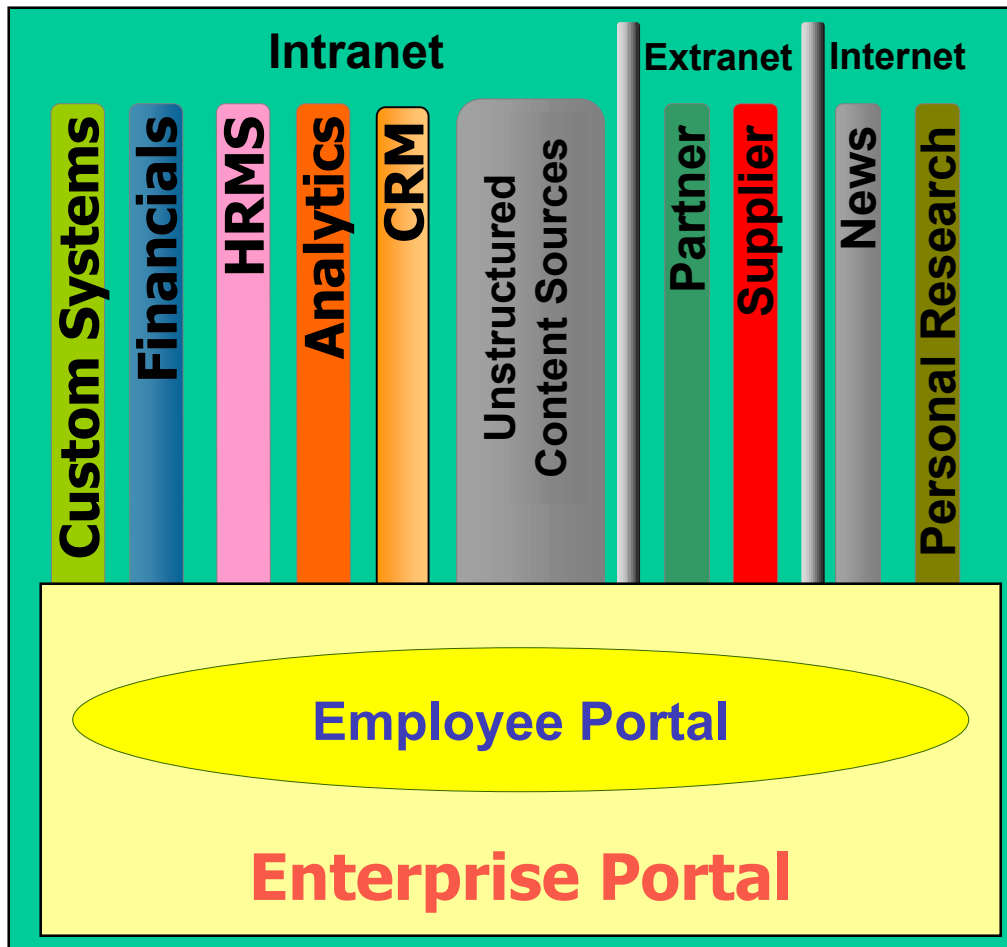- Personal Info

Applications
- Payroll
- Benefits
- Stock

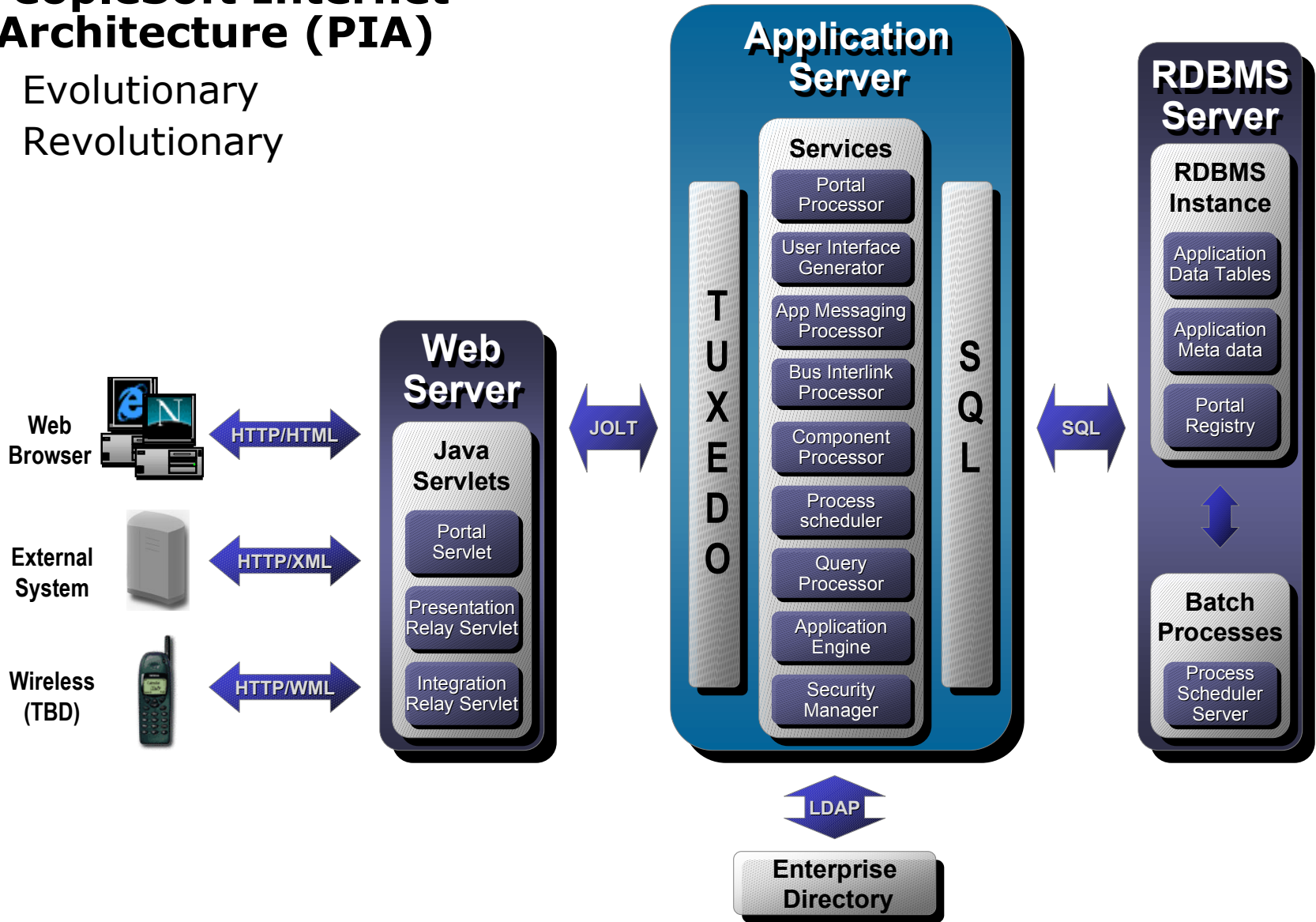**Documents**
- Paycheck
- Applications/Forms

Portal Content

Open Cross-Enterprise Solutions

Intranet

Custom Systems | Financials | HRMS | Analytics | CRM | Unstructured Content Sources

Extranet — Partner | Supplier

Internet — News | Personal Research

Employee Portal

Enterprise Portal

- ◆ Portals are agnostic
  - ◆ Aggregate silos of information
  - ◆ Must have full cross-enterprise navigation (taxonomy)
  - ◆ Applications not just information
- ◆ Role-based
  - ◆ What-I-See-Is-What-I-Need
  - ◆ New paradigm (Filtering)
- ◆ Split between Application and Technology in portal
  - ◆ Application content of where and how work efforts are completed
  - ◆ Technology to integrate solution
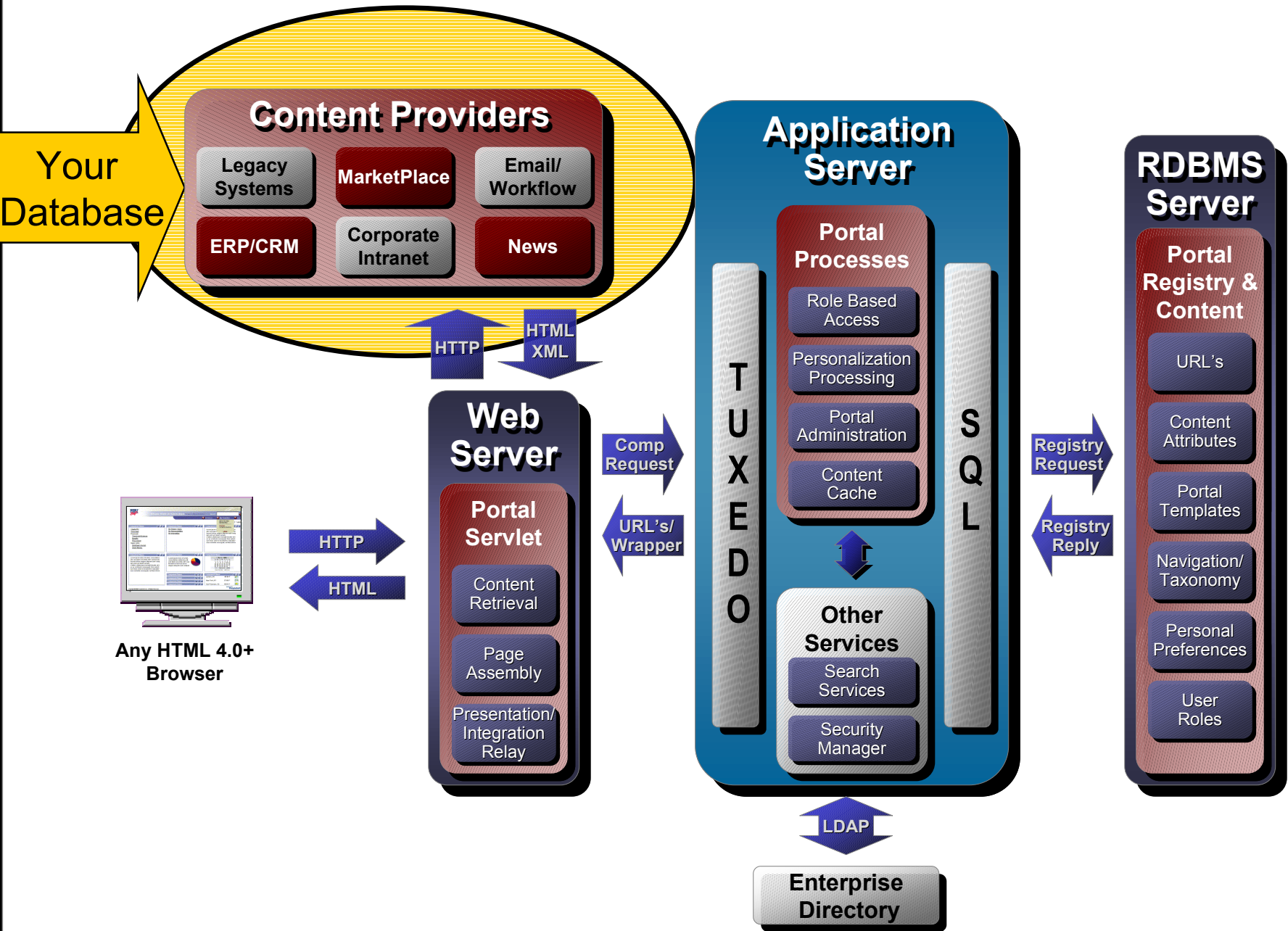- ◆ A "webtop" for the enterprise

PeopleSoft Internet Architecture (PIA)

- Evolutionary
- Revolutionary

Portal Technology over the Architecture

Your Database

Content Providers

- Legacy Systems
- MarketPlace
- Email/ Workflow
- ERP/CRM
- Corporate Intranet
- News

HTTP
HTML XML

Web Server

Portal Servlet

- Content Retrieval
- Page Assembly
- Presentation/ Integration Relay

Any HTML 4.0+ Browser

HTTP
HTML

Comp Request

URL's/ Wrapper

Application Server

TUXEDO

Portal Processes

- Role Based Access
- Personalization Processing
- Portal Administration
- Content Cache

Other Services

- Search Services
- Security Manager

SQL

Registry Request

Registry Reply

RDBMS Server

Portal Registry & Content

- URL's
- Content Attributes
- Portal Templates
- Navigation/ Taxonomy
- Personal Preferences
- User Roles

LDAP

Enterprise Directory

# PeopleSoft Deploys Employee Portal
Planet PeopleSoft
Case Study

Our Challenges

- Many in-house applications
  - PeopleSoft applications at various releases and multiple databases
  - Enterprise Reporting & Business Intelligence
  - Applications from other vendors
  - All unrelated in terms of sign on, security, user IDs
  - Mini-portals had emerged while waiting for us to implement a corporate portal
- We had several portals to choose from in-house including one being developed at PeopleSoft

Portal to Leverage Human Capital

Knowledge Capital . . .

- **Employees expertise and know-how**

- **Intellectual capital**
  - Patents
  - Methodologies
  - Best practices
  - Contracts
  - Reusable software
  - Formulae
  - Designs
  - New product ideas
  - External information
  - Your data warehouse
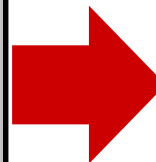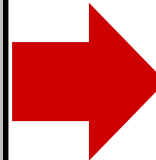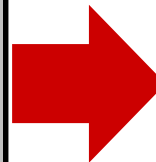
Increases Commercial Value

- **Speed**
  - Improve cycle time
  - Improved quality
  - Reduced cost
- **Innovation**
  - Reduce waste/reuse solutions
  - Continuously improve
  - Build skills
- **Better Decisions**
  - Quicker & more informed
  - Broader perspective
  - Based on historical results
- **Efficiency**
  - Lessons learned over time
  - Validate by experts and experiences
  - Ownership & accountability
  - Enterprise-wide foundation

Self-Service

Extending the Enterprise

eCompensation   eBenefits
eDevelopment   eRecruit
eEquity   eProfile
Manager Desktops ePay

Collaborative Applications

Enabling the Enterprise

Human Resources
Benefits Administration
Flexible Spending Account
Pension Administration
Payroll for North America
Payroll Interface
Time & Labor
Stock Administration
Global Payroll

Workforce Analytics

HRMS Enterprise Applications

Driving the Enterprise

Driving the Enterprise
Workforce Scorecard
Workforce Insight
Workforce Rewards
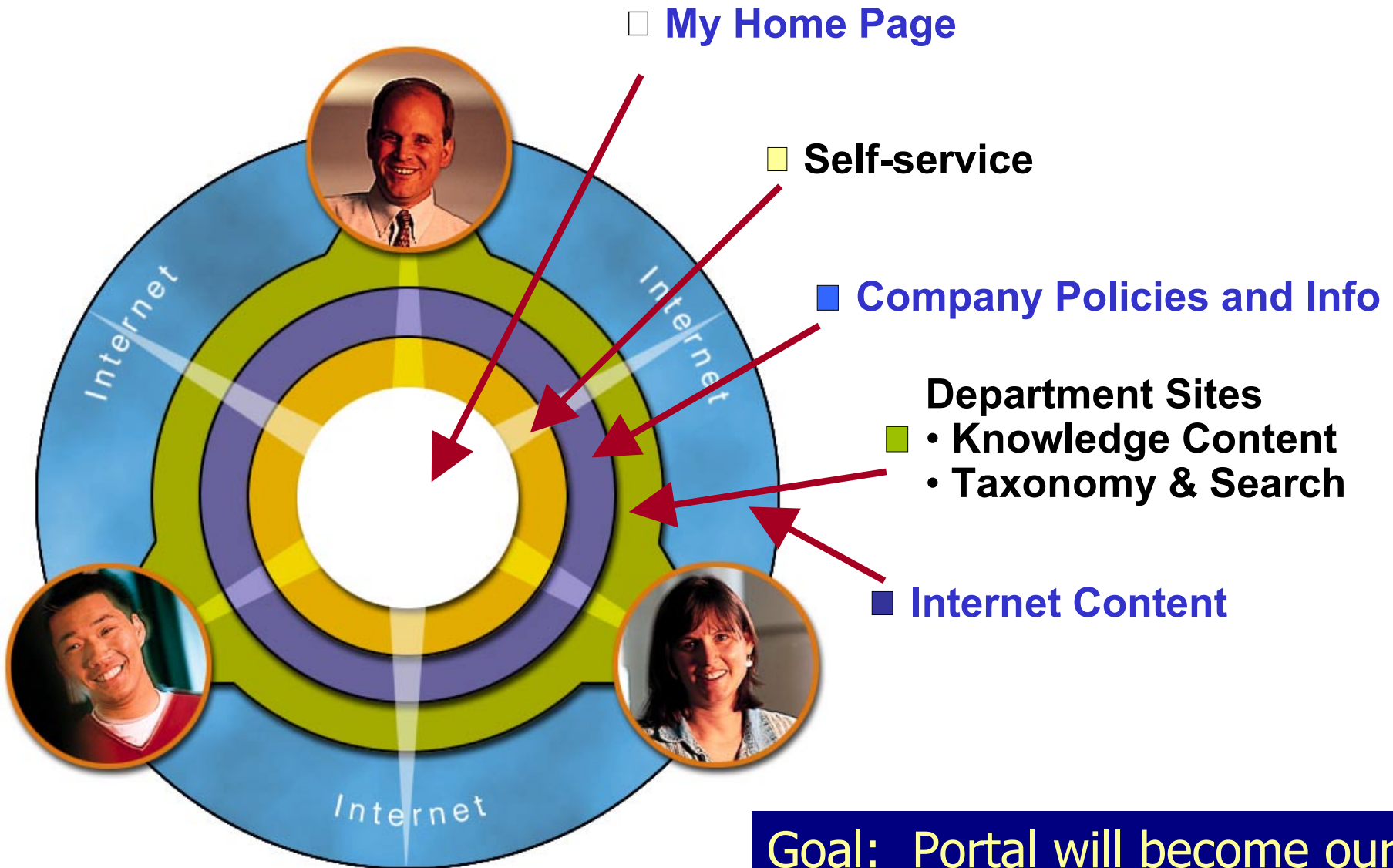
Employees
Suppliers
Customers

PeopleSoft Portal

Self-service is ENHANCED by the portal

Other Business Requirements

- **Decision Support -** Encompass transactions partnered with knowledge, content, decision tools - to drive better decisions and transactions

- **Personalization and Relevance -** Provide highly personalized, relevant information
  - Role-based Portal access; event-based activities; context-sensitive experience;

- **Open -** Support business processes beyond the enterprise through seamless interaction of all users - managers, employees, business partners

- **Pre-Integrated and Seamless -** Deliver instant and intelligent access to a community of suppliers and services
  - Deliver pre-integrated supplier content and services

☐ **My Home Page**

☐ **Self-service**

■ **Company Policies and Info**

Department Sites
■ **• Knowledge Content**
• Taxonomy & Search

■ **Internet Content**

Goal: Portal will become our employees' **"Webtop"**

- Consider what's delivered "out of the box"
  - A very quick win as we required multiple rapid ROI items from CIO for funding
- What external content is free (and legal)
  - What are you willing to subscribe to?
- Requirements gathering sessions and/or questionnaire using a varied audience
  - We recommend an incentive to respond
- Create a mockup of the interface before implementation of actual code
  - This is a VISUAL solution!!!
    - Comply with guidelines already in place
    - Test with a sample group to determine pagelets and features to be implemented

It Must Be EZ to Understand, EZ to Use

Event Guides
- Marriage
- Birth/Adoption
- Flexible Spending Accounts
▷ Compensation
▷ Faculty Event Tracking
▷ Personal Information
▷ Personnel Actions
▷ Procurement
▷ Recruiting
▷ Stock
▷ Stock-Optionee
▷ Time Reporting
▷ Training and Development
▷ Travel and Expenses
▷ User Preferences
- My Human Resources
- My Profile
▷ Manager Tasks
▷ HR Framework
▷ Hire Employees
▷ Employee Information
▷ Training
▷ Career Planning
▷ Time and Labor
▷ Plan Salaries
▷ Award Variable Compensation
▷ Report Total Compensation
▷ Forecast Compensation FRA

Marriage Life Event

This is a good time to consider how joining with another person into one household may affect your health care coverage, life insurance, tax withholdings, and other important choices.

This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this important event in your life.

Click Start to begin or continue the life event process.

[Start]

Steps	Description
Change Status	To change your benefit choices, you must first complete the Marital Status Change form.
Review Benefits	Review your current benefits summary.
Personal Information	Review your current name, address, phone numbers, email address, and emergency contacts.
Tax Information	Review and update your federal tax information.
Direct Deposit	Review and update your direct deposit information.

Implementation Team Staffing Profile

◆ ## Developers:

- ◆ 1.5 Web Engineers (JavaScript, HTML, some PeopleTools)
- ◆ 1.5 PeopleTools Engineers (Panels, some HTML and JavaScript)

◆ ## Designers:

- ◆ 2 Web producers (HTML templates, stylesheets, look and feel)
- ◆ 1 Graphics designer (Flash, graphics packages)

◆ ## Supporting Resources:

- ◆ 1 Intranet team manager
- ◆ 1 Project Manager
- ◆ 2 Marketing/Internal Communications
    - ◆ Branding, taxonomy, company news, portal "real estate", portal marketing plan, employee education, communications
- ◆ Infrastructure (web architect, DBA, user support)
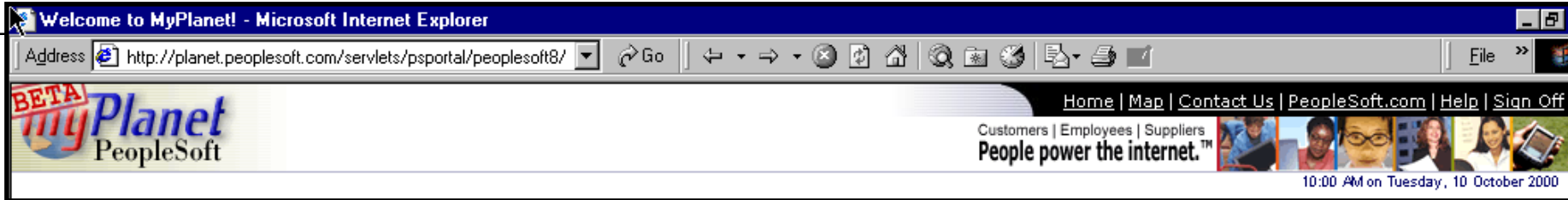
My Planet PeopleSoft

- Deployment of our PeopleSoft 8 Portal
    - 1st Step on larger program to have a total browser based enterprise
- Implemented prior to Upgrade of ERP/CRM
    - Included self-service from Legacy systems
    - Taxonomy for all departmental sites
- Next : Integration of PeopleSoft 8 apps

Our Roles and Timelines

Producers	Engineers	Architects
Information Architect(s)/Cybrarian(s) – taxonomy/site architecture	Web Developers – PeopleTools, HTML, JavaScript, etc.	System/Hardware Architects
User Experience/Graphic Design	PeopleSoft implementation experts – app specific developers (i.e., HRMS, FIN)	3rd party software support (e.g., metrics, etc.)
Content Authors/Managers/Providers	LDAP/Security infrastructure	LDAP/Security infrastructure
	Maintenance and administration tools	Maintenance and administration tools

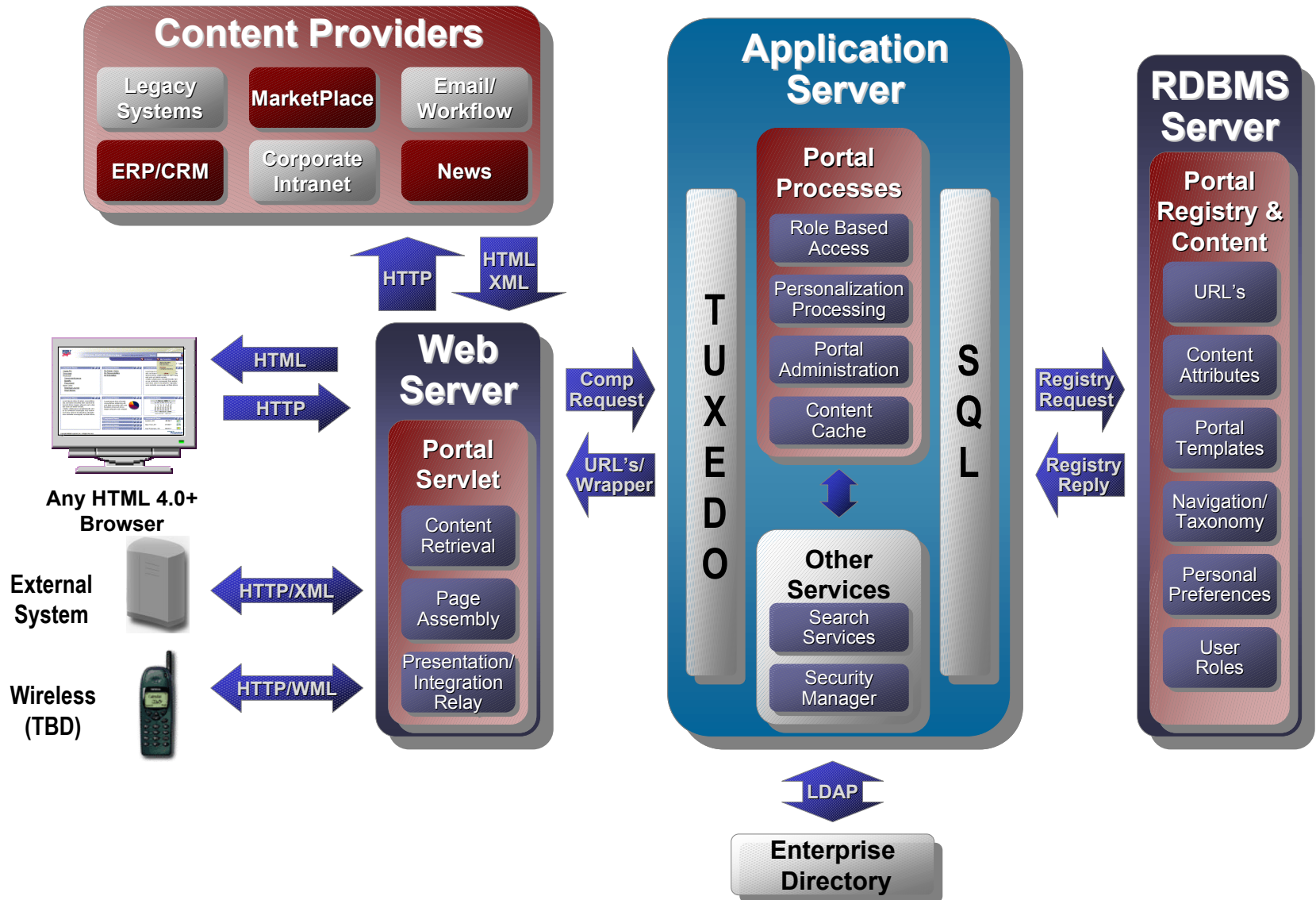Our Implementation Timeline

mid-June 2000: Began implementation
August 1, 2000: Alpha Test (300 users)
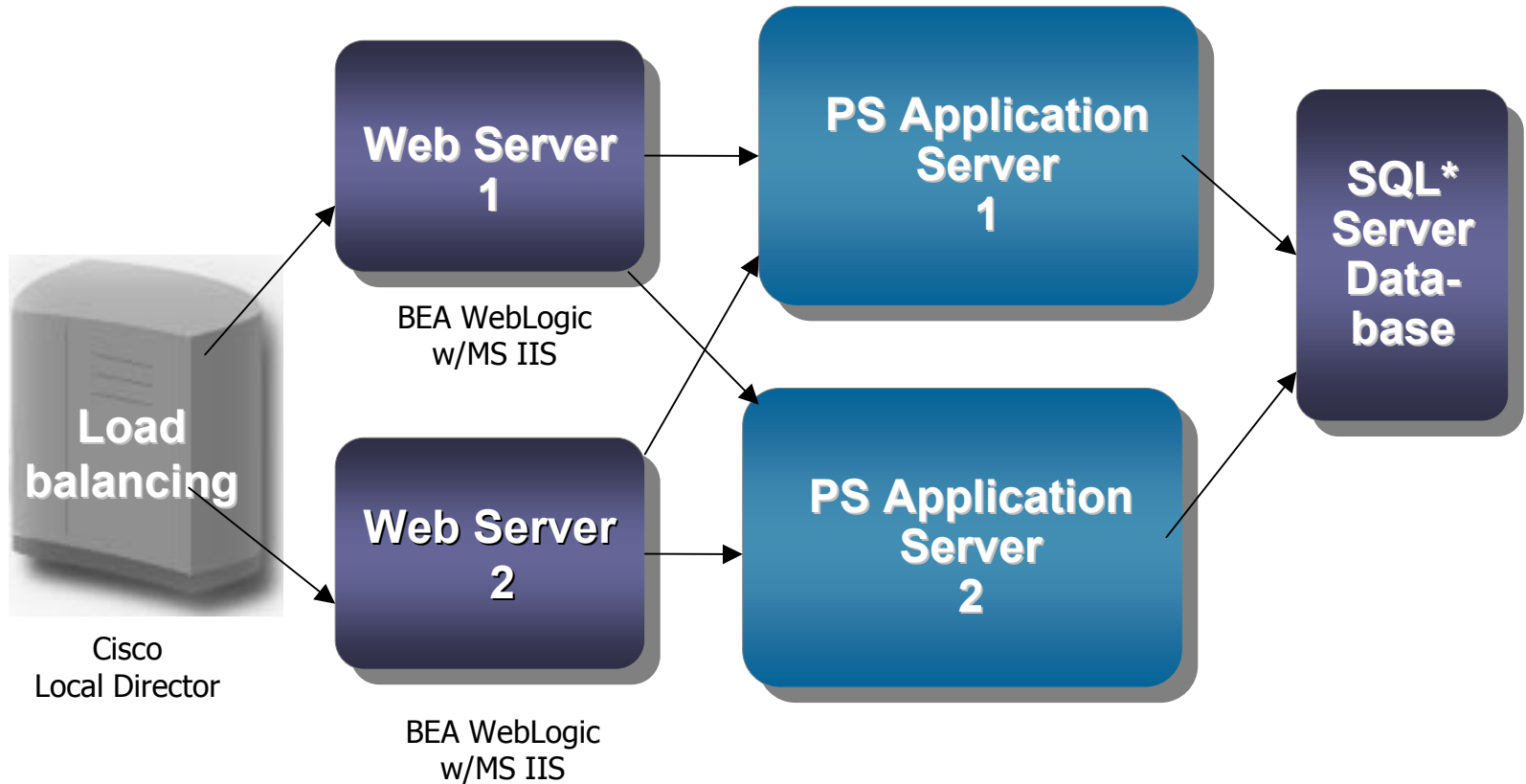September 1, 2000: Beta Test (3000 users)
October 2, 2000: Worldwide Go-Live (8000+ users)

Hardware Requirements: Portal Architecture

Content Providers
- Legacy Systems
- MarketPlace
- Email/Workflow
- ERP/CRM
- Corporate Intranet
- News

Web Server
- Portal Servlet
  - Content Retrieval
  - Page Assembly
  - Presentation/Integration Relay

Application Server
- TUXEDO
- Portal Processes
  - Role Based Access
  - Personalization Processing
  - Portal Administration
  - Content Cache
- Other Services
  - Search Services
  - Security Manager
- SQL

RDBMS Server
- Portal Registry & Content
  - URL's
  - Content Attributes
  - Portal Templates
  - Navigation/Taxonomy
  - Personal Preferences
  - User Roles

Any HTML 4.0+ Browser

External System

Wireless (TBD)

Enterprise Directory

HTTP — HTML/XML — HTML — HTTP — HTTP/XML — HTTP/WML — Comp Request — URL's/Wrapper — Registry Request — Registry Reply — LDAP

Load balancing

Cisco
Local Director

Web Server 1

BEA WebLogic
w/MS IIS

Web Server 2

BEA WebLogic
w/MS IIS

PS Application Server 1

PS Application Server 2

SQL* Server Data-base

All servers are 4 ways running NT w/2GB Memory

- PeopleSoft 8 Security
  - One userid with multiple roles - GOAL!!!
    - Key was Portal's ability to auto-define roles for employee - management savings
- Get role attributes from a number of sources:
  - Other applications (role synchronization)
  - Dynamic role rules (PeopleCode, SQR, LDAP grouping)
- Single Sign On is possible for many applications
  - Easiest for PeopleSoft 8 - enabled by applications
- What to look for in your LDAP
  - LDAP can act as a source of email and calendar integration information.
  - LDAP should contain all users of portal (employees, consultants)
- Used PeopleSoft's Directory Interface product
  - Synchronization LDAP and HR (system of record)

Implementing the Portal:
Other Considerations

- Search Engine
- Taxonomy
  - How content is categorized for easy retrieval
    - Whole new discipline!
  - Choose taxonomy method (automated or manual)
    - Usually both…
  - Test with a variety of users
  - Revisit often
- Usability testing!!!

Other Considerations

- Performance and load testing:
  - Test performance of external interfaces (e.g., LDAP, sites you're "pageletizing")
  - Ensure your load balancing/failover is working
- Implementation
  - Consider a phased implementation
  - Rapid and multiple quick wins!!!
- Education
  - "Show me how" demos
  - Internal communications on value and usage of portal
    - Spend more time "selling" than training!
   - Change management (e.g., paycheck print)

Ongoing Support

- Monitoring issues through internal help desk
  - Develop "show me how" based upon common issues encountered
- Gathering input on "wish list" items
- Working with other IS teams to provide pagelets
  - Manager and Employee dashboards
  - You MUST have compelling business content
- Single Sign On to legacy applications
  - Trade-off: now versus when web enabled
- Developing offline content for our remote users "road warriors"

Lessons Learned

- PeopleSoft 8 technology was key
  - Both evolutionary and revolutionary
  - Some architectural shifting
- Be sure your content providers understand that content must be updated frequently to maintain interest
- Provide offline content - road warriors
- Provide a wide variety of content (international, various sources, images)
- Implementing a portal is very different from implementing an ERP application
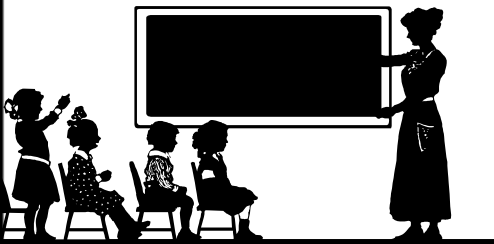
Expectations What a Portal Delivers

An Employee Portal will not solve all the issues, however it does break down many barriers to employee productivity.

- Creates an **integrated** web-top environment from isolated programs and information silos
- Provides automated identification and distribution of content **relevant** to the user
- Provides a personalized interface for each user based on their **role** in the organization
- Uses the **same infrastructure** used for customers, suppliers, employees, and third-party partners
- Serves as the point of delivery for common information, **self-service** functions, and services that cross the enterprise
- Integrates advanced **collaboration** capabilities
- Creates and exposes the real information in an **organization** so that it can be found and used by the employee

Lessons Learned

- Implementing the portal first sets the stage for other applications
- Toolset is very flexible and powerful, but as easy to use as ever
- Role-based engine was KEY to lowering maintenance and management costs
  - Problem is scope -- EVERYONE is now a user, and EVERYONE changes roles
- Migrate existing sites to new model as they are updated
  - Eat an Elephant -- one bite at a time

Why We Like the Portal

- Don't need to implement ERP apps first
- Enables self-service!!!
  - This was the ROI our execs wanted
- Can easily apply, from one place only, a new look for all intranet sites
- Application integration is quick and easy
- Content is role-based and roles can be derived from their logical sources
- Single Sign On and other features are infinitely extensible

Delivering applications through the portal automates application development, standardizes look and feel, and reduces maintenance and time to market.

Demonstration : Examples