

Stop gambling with your user documentation!

HEUG Presentation
July 29, 2014

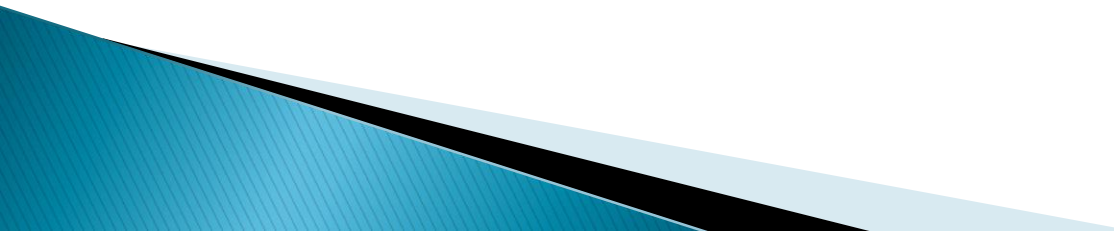


Your Presenter

- ▶ Desiree Downing
 - Computer Systems Analyst



Agenda/Contents

- ▶ About the State of Montana
 - ▶ Related Content in Action
 - ▶ Why related content is a good bet
 - ▶ Tools for Success with Related Content
 - ▶ How to Begin
 - ▶ Plan your strategy
 - ▶ Smart Coding Service ID's
 - ▶ Configuring for a win
 - ▶ Lessons Learned
 - ▶ What the Future Holds
- 

State of Montana

- ▶ PeopleSoft HCM 9.1
- ▶ PeopleTools 8.53
- ▶ Approximately 13,000 employees
- ▶ User documentation and communication are paramount at our decentralized organization



Related Content in Action

Related Content

Meeting start time: 11:21:36 AM 3/7/2014

Duration: 0:01:49

Organizer: ddowning@mt.gov

Participants: Downing, Desiree

Component Level

Favorites ▾ Main Menu ▾ > Manager Self Service ▾ > Time Management ▾ > Report Time ▾ > Timesheet

Home | Worklist | Add to Favorites | Sign out



Related Content ▾ New Window

Report Time

Timesheet Summary

Employee Selection Criteria

Employee Selection Criteria

Description	Value
Time Reporter Group	<input type="text"/>
Empl ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Department	<input type="text"/>
Reports To Position Number	<input type="text"/>
Location Code	<input type="text"/>

Clear Selection Criteria

Save Selection Criteria

Get Employees

View By: ▾

Show Schedule Information

Date:

[Previous Week](#) [Next Week](#)

- Self Service User Guide
- Job Data**
- Position Information
- Reported Time Audit
- Dynamic Group Membership Query
- Dynamic Group Security Query

Page Level

Work Location

*Reg Region:  United States

*Department:  Administration

Company: State of Montana

*Location:

Related Information

Verify Department ID

Reports To:

Dot-Line:

Supervisor Lvl:

Security Clearance:

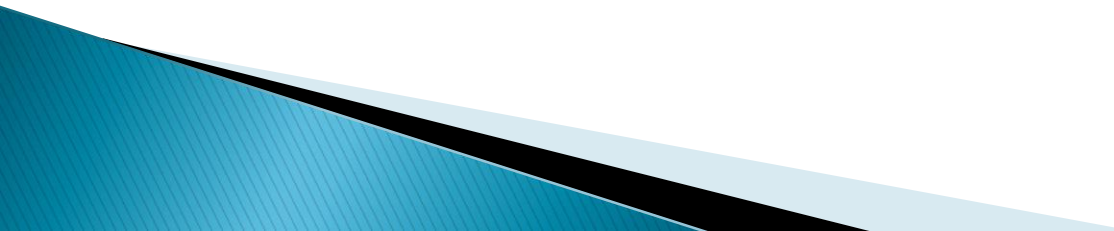
Why Related Content is a Good Bet

- ▶ Related Content is delivered with PeopleTools
- ▶ Gives users the resources when and where needed
- ▶ One click access within PeopleSoft
- ▶ Displays content in a split screen or new window
- ▶ Accessible without leaving the page, even if you haven't saved
- ▶ User friendly
 - The PeopleSoft pages and queries function the same in the related content screen
 - Security remains the same
- ▶ Simple setup and configuration

Tools for Success with Related Content

- ▶ Resources we provide include:
 - User Guides / Job Aids / Troubleshooting Documents
 - PeopleSoft Queries
 - PeopleSoft Components
 - Videos
 - Forms (fillable/submittable)
 - Webpages

How to Begin

- ▶ Identify problem areas
 - Common help desk questions
 - Data integrity issues
 - ▶ Get user input
 - Resources often used together
 - Determine which processes are time consuming and why
 - ▶ Pinpoint resources and tools
 - Classify resources
 - Develop a naming convention for service IDs
- 

Plan Your Strategy

- ▶ Map out where services are needed
- ▶ Decide what level to add each service
 - Component
 - Page
 - Field (red glyph)
- ▶ Identify
 - Component path
 - Page name
 - Page field name

Service IDs

▶ Define Tools

- UG – User Guide
- JA – Job Aid
- TS – Troubleshooting / Service Ticket
- TV – Training Video
- PSC – PeopleSoft Component
- PSQ – PeopleSoft Query

▶ Examples:

- UG_SEARCH_PEOPLE – search for existing people user guide
- JA_DIRECT_DEP_SCHEDULE – direct deposit prenote schedule
- PSC_JOB_DATA – job data PeopleSoft component
- PSQ_TL_GROUP_SECURITY – time and labor security query

Configuring For a Win

- ▶ Define Services
 - Set up the resources to provide
 - Each tool is given a service ID
- ▶ Assign Services
 - Attach service ID to pages, components, fields
 - Component with many services
 - Service assigned to many components

Define the Service

Downing, Desiree

Meeting start time: 7:35:44 AM 7/29/2014

Duration: 0:01:31

Organizer: ddowning@mt.gov

Participants: Downing, Desiree

A Note About Services

- ▶ There are several Portal Technology functions which use these services
 - Activity Guides
 - Related Actions
 - Related Content
 - Work Centers

Assign the Service

Downing, Desiree

Meeting start time: 7:41:51 AM 7/29/2014

Duration: 0:01:50

Organizer: ddowning@mt.gov

Participants: Downing, Desiree

Lessons Learned

- ▶ Identify naming conventions for service IDs makes assigning a breeze
- ▶ Unsecure external URLs may not display
- ▶ We uploaded our content to our servers
- ▶ More is better!



What the Future Holds

- ▶ Video content
- ▶ Troubleshooting documents / service tickets

Questions?



Thank you for attending!

- ▶ Please feel free to contact me if you have additional questions as you get started, I would love to help!
 - Desiree Downing
 - Computer Systems Analyst
 - Email: ddowning@mt.gov

