Stop gambling with your user documentation!
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
### Timesheet Summary

**Employee Selection Criteria**

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Reporter Group</td>
<td></td>
</tr>
<tr>
<td>Empl ID</td>
<td></td>
</tr>
<tr>
<td>Empl Record</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Reports To Position Number</td>
<td></td>
</tr>
<tr>
<td>Location Code</td>
<td></td>
</tr>
</tbody>
</table>

- **Clear Selection Criteria**
- **Save Selection Criteria**
- **Get Employees**

**View By:** Week

**Date:** 03/06/2014

- **Show Schedule Information**

- **Previous Week**
- **Next Week**
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
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