

PeopleSoft Related Content: Customization-Free Enhancements

A SpearMC Technology Presentation

Introductions

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- Professional PeopleTools Consultant - 10 Years
 - Enhancements
 - Production Support
 - Upgrades
 - PeopleTools Training Instructor

- Formerly a Developer at PeopleSoft, Inc – 8 Years
 - Financials Applications
 - PeopleTools Reporting
 - Enterprise Services Automation

- Expertise
 - User Experience Design
 - Software Architecture

Goals & Agenda

➤ Goals

- Understand what problems PeopleSoft Related Content Framework can solve
- Learn the differences between Related Content and Related Actions
- Gain enough knowledge of Related Content to begin your own exploration!

➤ Agenda

1. Customizations, Enhancements, and Upgrades
2. PeopleSoft Related Content Framework Overview
3. Demo

Introductions

Tell me about yourself!



- Which PeopleSoft Product Lines?
 - E.g. Financials / Supply Chain, Human Resources

- Which Application version?
 - E.g. 9.2, 9.0, 8.9

- Which PeopleTools version?
 - E.g. 8.54, 8.51, 8.49

- Who's used Related Content before?
 - Delivered?
 - Custom?



Introducing the PeopleSoft Related Content Framework

Enhancements Without Customizations

➤ Options for Enhancing Your PeopleSoft System

- Option 1: Customize delivered objects
 - Pro: Ultimate design flexibility
 - Con: Guaranteed upgrade headaches
- Option 2: Create your own objects (“Bolt-On”)
 - Pro: Reduced upgrade impact
 - Con: Less design flexibility
- Option 3: Configuration only
 - Pro: No upgrade impact!
 - Con: Very limited ability to make meaningful enhancements

➤ Recent PeopleTools releases include more powerful ways to enhance without modifying delivered objects

- Pagelet Wizard
- WorkCenters
- Pivot Grids
- Related Content Framework

Related Content Framework Overview

➤ What's is it?

- A set of features that allow you to extend the functionality of existing transaction pages with configuration
- Introduced in 8.50, many enhancements since

➤ Extend how?

- Present supporting info and functionality alongside existing transaction pages
 - Other pages
 - Pagelets
 - Query results
- Supporting information can be displayed in right sidebar, bottom pane, modal window, new browser tab, or replace transaction page
- Right-click “action menus” on page fields that can either display related information or run PeopleCode
- Related pages and transaction page can interact (within limits)

Limitations

- **You cannot use the Related Content Framework to fundamentally change the rules of a transaction**
 - You can't modify Save logic
 - Example: You can't make a field required
 - You can't add fields to a transaction

What Can The Related Content Framework Do For Me?

➤ Reduce Clickiness

- Instead of making the user navigate to other pages, bring those pages to the user!

➤ Provide transaction “assistants”

- Provide guidance on business rules that are not enforced by application logic
- Increases transaction quality
- Eliminate reliance on supplemental spreadsheets and documents

Related Content vs. Related Actions

➤ Related Content

- Related Content appears in Related Content Frame
 - Can be configured to be either a tall, narrow sidebar at the right side of the browser window or a short but wide pane along the bottom of the browser window
 - In the sidebar, multiple items are stacked
 - In bottom pane, multiple items are tabbed and only one shows at a time

➤ Related Action

- Opens content in modal window, new browser tab, or transaction area; or runs PeopleCode

Setting Up Related Content Framework

1. Make sure an Authentication Domain is specified in the Web Profile

➤ That's it!

Configuring Related Content Framework

➤ Adding Related Content/Actions to a Component

1. PeopleTools > Portal > Related Content Service > Manage Related Content Service
2. Search for portal menu to component
3. If found, click Edit; otherwise, click [Assign Related Content to an Application Page](#) at bottom of page
4. Add Related Content on first tab
5. Add Related Actions on second tab
6. Configure layout on third tab for both Content and Actions



PeopleSoft Related Content Framework

Demo

Related Content Framework

➤ Introduced in 8.50, many enhancements since

- 8.50
 - Component-level only
 - Related Content window only at bottom of page
- 8.51
 - Page and field level (with red “glyphs”)
 - New Window and Transaction Window targets
 - Content References without a service definition
- 8.52
 - Configurations can be included in Application Designer Projects
 - Pagelets without a Service definition
 - Custom parameters can override those from search record
 - Right-side related content
 - Modal window content
- 8.53
 - Custom Actions menu (“Action Widget”) anywhere on page (requires page change)
- 8.54
 - Action Widget easier to develop

Contact Information



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