

SESSION #10637

Extending and Customizing PeopleSoft Activity Guides using AG Composer Framework



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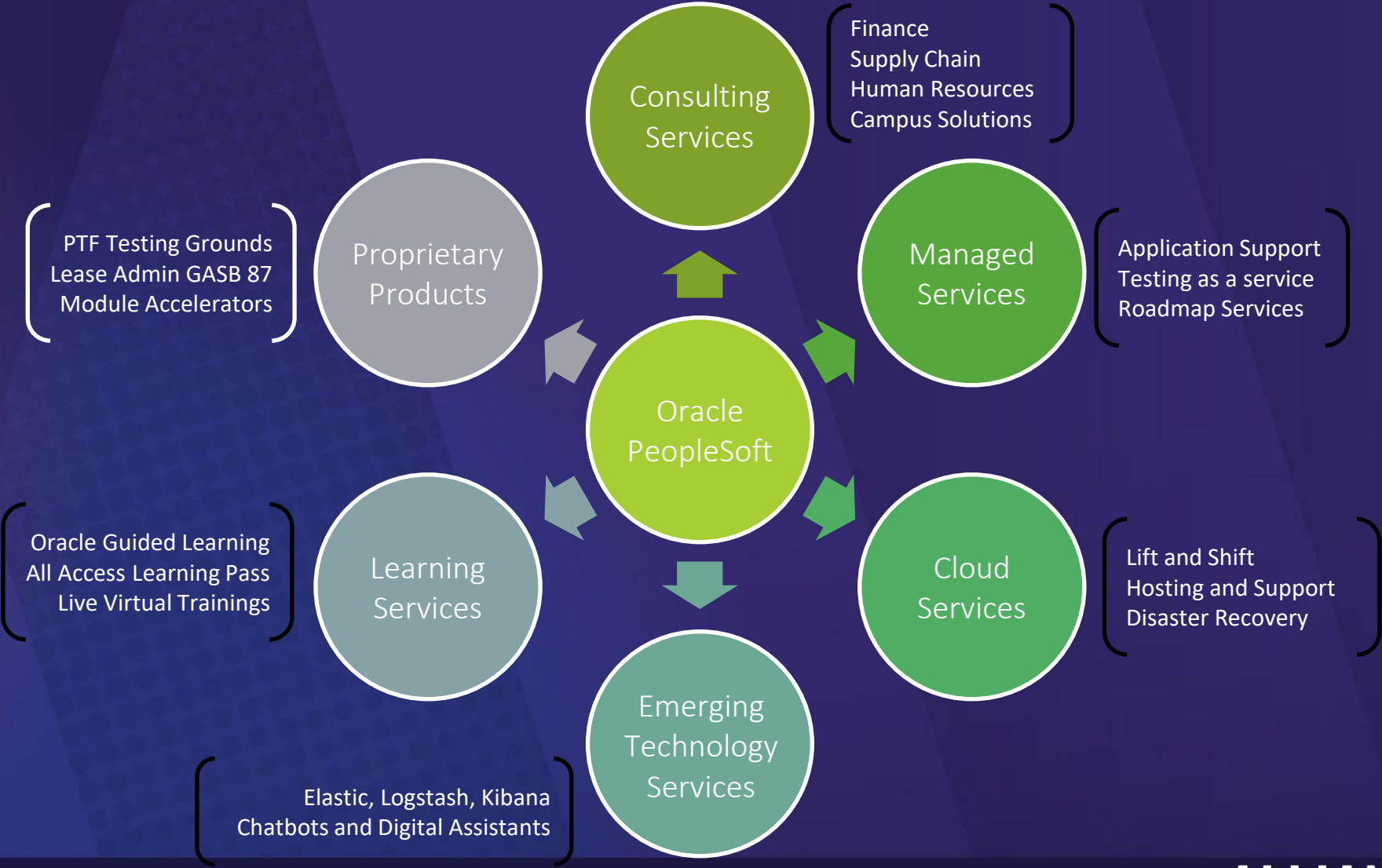


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Healthcare | Higher Ed | Financial Services | Public Sector



Attendees Survey

Product Pillar – HCM/FSCM/CS?

Functional or Technical background?

Experience with Activity Guides?

Agenda

Activity Guides Overview

- Introduction to Activity Guides (AG)
- Activity Guide Demo
- Life Cycle of an Activity Guide
- Use cases for Activity Guides

Guided Processes Design

- Designing a guided process
- Sample Guided Process Review

AG Composer Framework

- Overview of AG Composer Framework
- Working with AG Categories
- Working with AG Templates

Deploying Activity Guides

- Deployment Options
- Deployment Process Review

Managing AG Instances

- Understanding AG Instances
- Administering AG Instances

AG Composer Advanced

- Activity Guide Security
- Template Assignment
- Contextual Data
- Notifications

Activity Guide Migration

- AG Migration Components
- Migration Process Review

Activity Guides

- *Fluid Activity Guides provide a simplified and streamlined approach to completing a business process*
- *Create guided templates by combining multiple standalone steps performed by the user*
- *Track progress and completion of tasks in the guided process*
- *Combine with other frameworks like Acknowledgement, Questionnaires, Documents etc. to create comprehensive business process*
- *Assign templates to users based on automated rules*

The screenshot displays the 'OnBoarding for USA' interface for a user named David Ho, a Senior Financial Analyst. The interface is divided into a left sidebar with a list of sections and a main content area. The sidebar sections are: Ethnic Groups (Not Started), Documents (Not Started), Attachments (Not Started), Personal Details (Not Started), Talent Profile (Not Started), Benefits (Not Started), Payroll (Not Started), and Summary (Visited). The main content area is titled 'Summary' and includes a 'Complete' button. Below the title, it says 'To finish the OnBoarding process, please select the **Complete** button.' A table titled 'Steps' follows, showing 25 rows of tasks. The table has columns for Step, Status, Date Completed, Required, Due Date, Mark Complete, and Go to Step. The tasks listed are: Before You Start (Complete), Welcome (Complete), I-9 (Overdue), Disability (Visited), Veteran Status (Not Started), Ethnic Groups (Not Started), and Documents (Not Started). Each task has a 'Mark Complete' button and a 'Go to Step' button.

Step	Status	Date Completed	Required	Due Date	Mark Complete	Go to Step
Before You Start	Complete	04/06/2020	No		Completed	Go to Step
Welcome	Complete	04/06/2020	No		Completed	Go to Step
I-9	Overdue		Yes	06/01/2017	Mark Complete	Go to Step
Disability	Visited		No		Mark Complete	Go to Step
Veteran Status	Not Started		No		Mark Complete	Go to Step
Ethnic Groups	Not Started		No		Mark Complete	Go to Step
Documents	Not Started		No		Mark Complete	Go to Step

Activity Guides

HCM



- ☐ Life Events
- ☐ Open Enrollment
- ☐ Incident Reporting
- ☐ Onboarding
- ☐ Offboarding
- ☐ Fluid Position Data
- ☐ Fluid Job Data
- ☐ Remote Worker
- ☐ Extended Absence Request

FSCM



- ☐ Contracts
- ☐ Payment Cart
- ☐ Expenses - Hotel
- ☐ GL Business Unit
- ☐ Lease Migration
- ☐ Payment Request
- ☐ Supplier Evaluations
- ☐ Bank Account Transfer

Campus Solutions



- ☐ Class Search and Enroll
- ☐ Drop Classes
- ☐ Swap Classes
- ☐ Update Classes
- ☐ Make a Payment
- ☐ Apply for Graduation

Polling Questions

Have used a delivered Activity Guided process?

Have you customized a delivered Activity Guide?

Life Events

Betty Locherty

Finance Director

* Indicates required field

There are some events that involve you as the Employee or your family members.

Review the choices and select the appropriate Event. Then enter the date of your event.

Employee

☐ I got married

☐ I had a baby

☐ I adopted or gained legal custody/guardianship of a child

☐ I got divorced/legally separated

*As Of

MM/DD/YYYY

Start Life Event

Activity Guide Demo

Guided Process Design

To develop and deploy an activity guide, follow this high-level procedure:

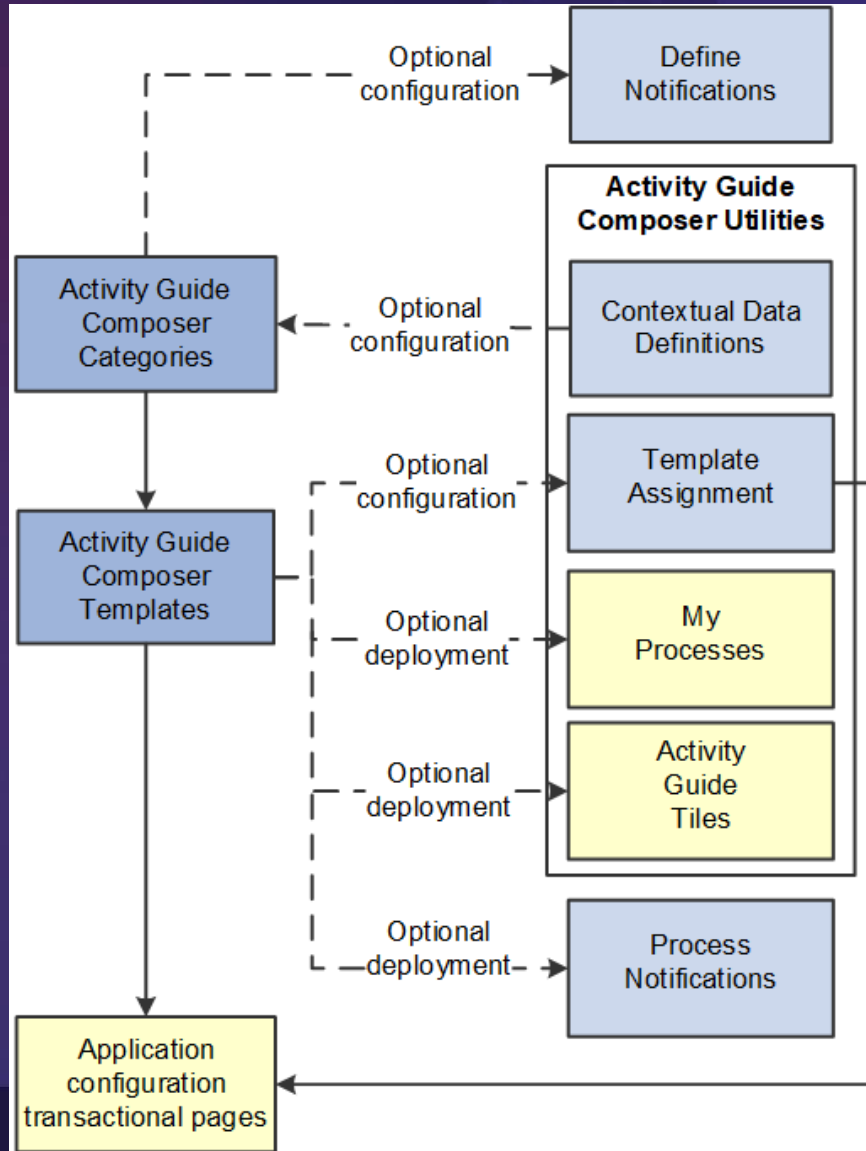
1. Determine the tasks to be completed by the users and the order of the tasks
2. Determine whether task groupings exist—that is, summary tasks serve as parents to detailed tasks
3. Determine which PeopleSoft component (transaction) corresponds to each task. Alternatively, a task can be associated with a PeopleSoft query, a non-PeopleSoft URL or a process.
4. Determine which user or role is to be assigned to each task.
5. Determine whether each task requires any pre-processing or post-processing logic.
6. Determine whether the activity guide instance is to be created dynamically or manually.

Activity Guide Design Considerations

- If the user accesses and updates a transaction directly rather than through the action item link in the activity guide , then any status change affected there will not be reflected in the activity guide.
- If an action item is linked to an external URL then status cannot be automatically marked as complete.
- Does not support a multistep transaction such as pivot grid wizard to be an individual step in the guided process
- Activity guides support a two-level hierarchy only—that is, only one level of detail is supported beneath a summary action item.
- The Related Content frame configured for a classic page will not be displayed when that page is rendered inside any fluid wrapper, such as in a fluid activity guide or in the fluid master/detail container.
- Activity guides and fluid navigation collections do not support conditional navigation.

Activity Guide Composer Framework

Activity Guide Composer



- **Activity Guide Composer framework** is designed to improve the deployment and management of fluid activity guides by separating the technical and functional configuration.
- **Activity Guide Categories:** Foundational setup that requires Technical Knowledge and pre-requisite tasks to create guided processes.
- **Activity Guide Templates:** Replicates the design of guided process, intended for functional users to build and maintain. Multiple templates can refer to one Category.
- AG Composer framework includes utilities for automating assigning, notifications, testing and deployment
- Provides ability to easily clone AG Categories and Templates

Activity Guide Category

- Application Package (Controls Activity Guide behavior)
- Administrator Security
- Context Fields
- Actions
- Images
- Assignees
- Steps
- Notifications

Activity Guide Templates

- Activity Guide Type
- User Security
- Additional Actions
- Sub Banner
- Select and Organize Steps
- Groups, Attributes and Dependencies
- Notifications
- Activation

Activity Guide - Navigations

- **Activity Guide Composer Configurations**
 - Home > Enterprise Components > Activity Guide Composer
- **Activity Guide Technical and Administration Pages**
 - Home > PeopleTools > Activity Guides

When a user create an activity guide template, the system also creates a PeopleTools activity guide template using the PeopleTools Activity Guide application process integration (API).

This combines the technical data from the activity guide category and the functional data from the activity guide template to save a PeopleTools activity guide template.

Instructor Demo

Working with Activity Guide Category & Templates

Session Break (5 Mins)

Trainee Exercise

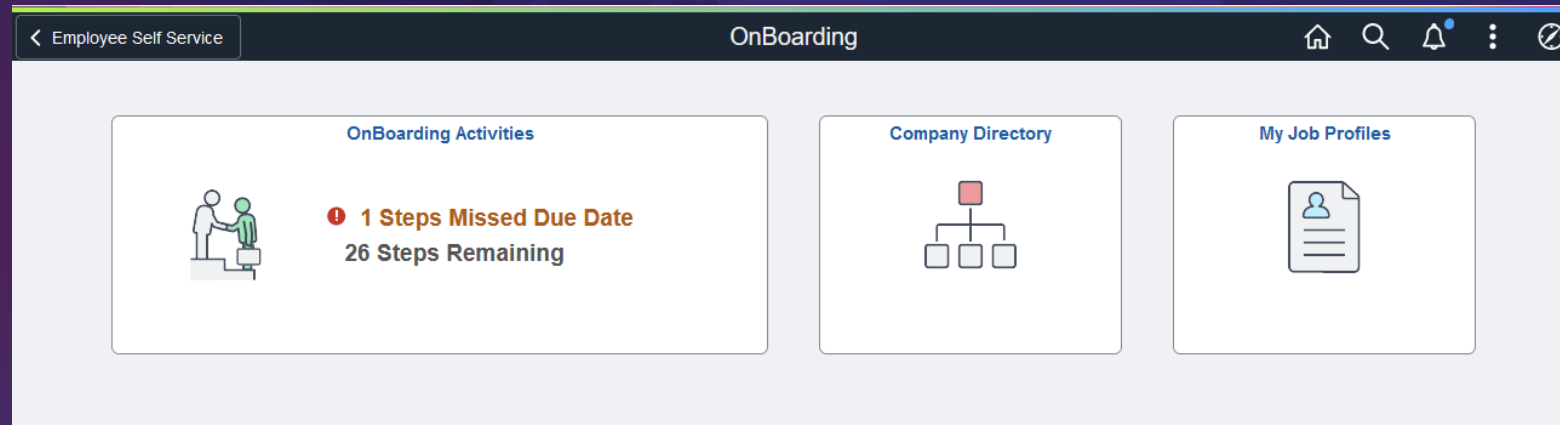
Create/Update Activity Guide Templates

Validate Trainee Activity Guides

Deployment Options

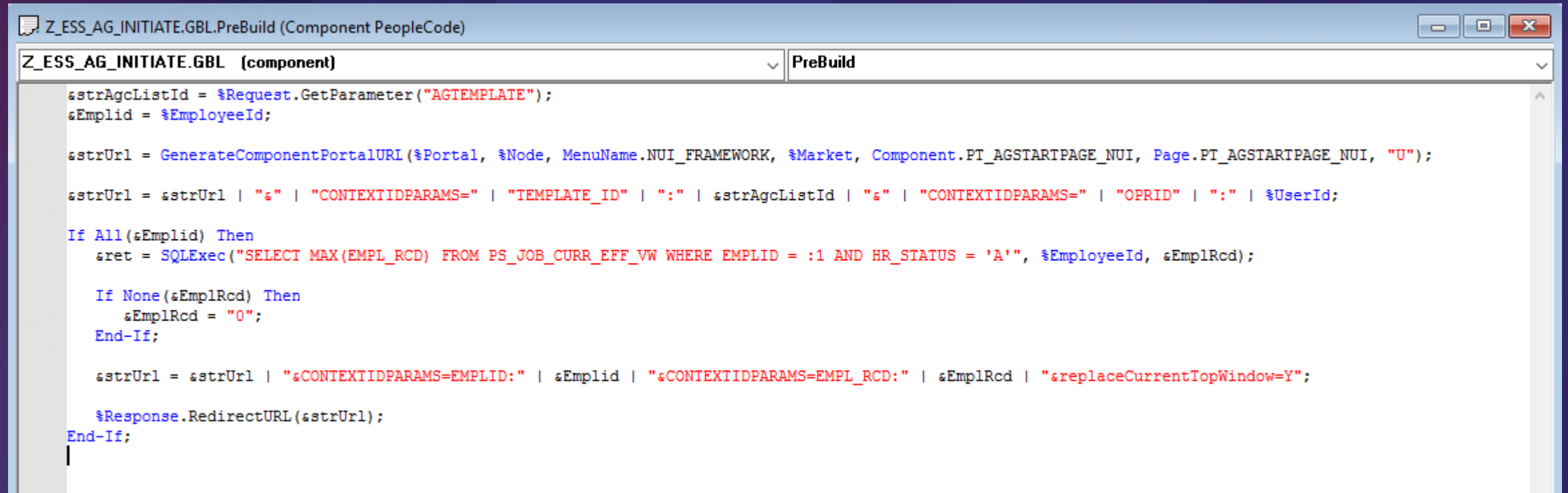
- **Activity Guide Composer provides various means to deploy and access activity guide processes.**
 - 1. Custom Pages:** Create custom pages and code to initiate an Activity Guides
 - 2. My Processes:** Centralized page to deploy activity guide templates to users
 - 3. AG Composer Tiles:** Custom tiles to grant assignees easy access to an activity guide.

Launching Activity Guides



The screenshot shows the 'Life Events' interface for Rosanna Channing, Senior Accounting Manager. The page has a navigation bar with a back arrow, 'Benefit Details', and the title 'Life Events'. Below the navigation bar, there's a header with the user's name and title. The main content area contains instructions: 'There are some events that involve you as the Employee or your family members. Review the choices and select the appropriate Event. Then enter the date of your event.' Below this, there's a section titled 'Employee' with four radio button options: 'I got married', 'I had a baby' (which is selected), 'I adopted or gained legal custody/guardianship of a child', and 'I got divorced/legally separated'. At the bottom, there's a date selection field labeled '*As Of' with the date '10/12/2022' and a calendar icon. Below the date field is a blue button labeled 'Start Life Event'. At the very bottom, there's a disclaimer: 'The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.'

Activity Guide – Launch Peoplecode



The screenshot shows a window titled "Z_ESS_AG_INITIATE.GBL.PreBuild (Component PeopleCode)". The window has a tab bar with two tabs: "Z_ESS_AG_INITIATE.GBL [component]" and "PreBuild". The "PreBuild" tab is selected. The main area contains the following PeopleCode:

```
&strAgcListId = %Request.GetParameter("AGTEMPLATE");
&Emplid = %EmployeeId;

&strUrl = GenerateComponentPortalURL(%Portal, %Node, MenuName.NUI_FRAMEWORK, %Market, Component.PT_AGSTARTPAGE_NUI, Page.PT_AGSTARTPAGE_NUI, "U");

&strUrl = &strUrl | "&" | "CONTEXTIDPARAMS=" | "TEMPLATE_ID" | ":" | &strAgcListId | "&" | "CONTEXTIDPARAMS=" | "OPRID" | ":" | %UserId;

If All(&Emplid) Then
    &ret = SQLExec("SELECT MAX(EMPL_RCD) FROM PS_JOB_CURR_EFF_VW WHERE EMPLID = :1 AND HR_STATUS = 'A'", %EmployeeId, &EmplRcd);

    If None(&EmplRcd) Then
        &EmplRcd = "0";
    End-If;

    &strUrl = &strUrl | "&CONTEXTIDPARAMS=EMPLID:" | &Emplid | "&CONTEXTIDPARAMS=EMPL_RCD:" | &EmplRcd | "&replaceCurrentTopWindow=Y";

    %Response.RedirectURL(&strUrl);
End-If;
```

Polling Questions

What launch method you have observed on the delivered Activity Guides?

PeopleTools Activity Guide Templates

PeopleTools > Activity Guides > Activity Guide Templates

[Activity Guide System Options](#)

Manage Activity Guide Templates

[New Window](#) | [Help](#) | [Personalize Page](#)

Manage Activity Guide Templates

Create Template

Activity Guide Templates

1-50 of 54

View All

	Title	User ID	Last Updated Date	Active	Properties	View Instances	Clone Template
☐	LB Training Activity Guide 1	LBALASUBRAMANIAM	05/25/2022	☒	Properties	View Instances	Clone Template
☐	LB Training Activity Guide 1	LBALASUBRAMANIAM	05/23/2022	☒	Properties	View Instances	Clone Template
☐	Day 1 Onboarding	RCHANNING	02/24/2022	☒	Properties	View Instances	Clone Template
☐	Global Chatbot Configuration	PS	02/10/2022	☒	Properties	View Instances	Clone Template
☐	OnBoarding for USA	PS	01/11/2022	☒	Properties	View Instances	Clone Template
☐	OnBoarding for Canada	PS	01/11/2022	☒	Properties	View Instances	Clone Template
☐	Standard OnBoarding	PS	01/11/2022	☒	Properties	View Instances	Clone Template

Activity Guide Instances

PeopleTools > Activity Guides > Activity Guide Instances

Clone Category

Manage Activity Guide Instances

HomeSearchNotificationsHelp

Manage Activity Guide Instances

Filters

Template

Instances Updated On or After05/01/2022

Display Instances Created By

Display Instances Administered By

Status

Count50

☒ Active

☒ Inactive

FilterReset

1-5 of 5

Activity Guide Instances

1-5 of 5

View All

	Title	Context Data	Template	Status	User ID	Last Updated Date	Active	Properties
☐	Activity Guide Composer	AGC_TEMPLATE_ID=LBAGT01 EFFDT=2022-05-01 OPRID=LBALASUBRAMANIAM	Activity Guide Composer	In Progress	LBALASUBRAMANIAM	05/11/2022	☒	Properties
☐	Create Questionnaire	EOQF_CATEGORY=SMC_SURVEY EOQF_QSTNR_CODE=SMC_AG_SURVEY OPRID=LBALASUBRAMANIAM	Create Questionnaire	In Progress	LBALASUBRAMANIAM	05/08/2022	☒	Properties
☐	LB Training Activity Guide 1	EMPLID=KU0007 EMPL_RCD=0	LB Training Activity Guide 1	In Progress	BLOCHERTY	05/11/2022	☒	Properties
☐	LB Training Activity Guide 1	EMPLID=KU0046 EMPL_RCD=0	LB Training Activity Guide 1	In Progress	LBALASUBRAMANIAM	05/11/2022	☒	Properties
☐	Benefits Open Enrollment	BENEFIT_RCD_NBR=0 EMPLID=KU0046 EVENT_ID=0 OPRID=RCHANNING SCHED_ID=KU23	Benefits Open Enrollment	In Progress	RCHANNING	05/12/2022	☒	Properties

Select All

Clear All

Delete

Activity Guide Instance

- Review details status of Activity Guide – Action Items
- User Assigned and completion Status
- Audit Information
- Re-assign Action Items
- Delete Activity Guide Instances

< Manage ActivityGuide Instances

LB Training Activity Guide 1

Home

Search

Notifications

More

Help

LB Training Activity Guide 1

LB Training Activity Guide 1

Overall Start Date 05/11/2022

Overall Due Date

Action Item Details

General Information

User Assignments and Status

Schedule Information

Service Configuration

Process Configuration

Audits

More

Select	Hierarchy	Sequence	Summary	Content Type			Title		Active	Fluid	
☐	Welcome Video	980	☐	PS Component	Assign Service	Create Service	Welcome Video	Choose Parent Action	☒	☒	Configure Related Data
☐	Acknowledgement	985	☐	PS Component	Assign Service	Create Service	Acknowledgement	Choose Parent Action	☒	☒	Configure Related Data
☐	Emergency Contact	990	☐	PS Component	Assign Service	Create Service	Emergency Contact	Choose Parent Action	☒	☒	Configure Related Data
☐	Employee Survey	995	☐	PS Component	Assign Service	Create Service	Employee Survey	Choose Parent Action	☒	☒	Configure Related Data

Add

Delete

Save

Activity Guide Instance Tables

PeopleTools tables commonly used for troubleshooting,

- *SELECT * FROM PS_PTAI_ITEM WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_HIER WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_ATTACH WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_ITEM_CNTXT WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_ITEM_LNG WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_ITM_ASGNTO WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_OVRPGT_BTN WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*
- *SELECT * FROM PS_PTAI_OVRPGTBTLG WHERE PTAI_ITEM_ID LIKE 'LBAGT01%';*

Instructor Demo

Manage Activity Guide Instances

Activity Guide Security

- **Delivered roles for AG Composer Framework**
 - AG Composer User
 - AG Composer Administrator
 - Portal Administrator – Needed for PT Activity Guide pages
- **Security Access on Activity Guide Category**
 - Who can update specific Activity Guide Category
 - Who can add/update Activity Guide Templates belonging to a category
 - Assignees Tab defines who all can participate in the guided process
- **Activity Guide Items are assigned to a specific user when the instance is launched.**
- **Once assigned, task assignment will not change until overridden by administrator manually on 'Activity Guide Instance' page**
- **User must have access to individual pages and services for every step in the Activity Guide**

Activity Guide Contextual Data

- System uses contextual data and fields to retrieve and display data in an activity guide from a specified source table. Application delivers some contextual data but customers can also add their own.
- Derived contextual data can be displayed in the fluid sub banner, page text, or, if its a date field, to configure the start and due date of a step.
- System uses the required context fields to retrieve data from the specified source table. Therefore, the required context fields are typically the keys of the table that enable you to retrieve a row of data from the source table.

AG Contextual Data

Enterprise Components > Activity Guide Composer > Utilities > AG Composer Contextual Data

[< Define Notifications](#)AG Composer Contextual Data

Definition

Test

Contextual Data

EE_PERSON_DATA

*Description

Employee Person Data

Short Description

EE Person Data

Long Description

This contextual data definition will retrieve employee person data.

*Source Table

PERSONAL_DATA

Data Type Code

System Data

Required Context Fields

1-1 of 1

*Required Context Field	Field Long Name		
EMPLID	Empl ID	+	-

Contextual Data Fields

1-1 of 1

*Field Id	*Source Field	*Description	Short Description	Related Data Type		
001	NAME_DISPLAY	Display Name	Display Name	None	+	-

Save

Return to Search

Previous in List

Next in List

Add

Update/Display

Definition | Test

Instructor Demo

Activity Guide Contextual Data

Activity Guide Notifications

- Enable you to create and send notifications to the assignees associated with activities
- Beneficial when using a template that requires multiple users to complete different steps
- Set notification defaults on Activity Category configuration, can be overridden at the template level
- System provides three notification types – Initial, Overdue, Reminder
- Batch Process delivered to schedule automated notifications

Activity Guide Notifications

Enterprise Components > Activity Guide Composer > AG Composer Notification Text

Define Notifications

Activity Guide Category

OFFBOARDING

OffBoarding

Notification

HR_OFFBOARD_INIT_NOTIFICATION

Notification Details ?

Description

OffBoarding Process Start

Data Type Code

System Data

Push Notification

Text

OffBoarding tasks are available for your review and update.

Email Notification

Priority

2-Med

Subject

OffBoarding tasks require your attention

Message

Dear %AG_USER%,
OffBoarding tasks associated to the following position are available for your review and updates:
%PERSONAL_DATA-NAME_DISPLAY%
%JOBCODE_TBL-DESCR%

Please ensure completion of your assigned tasks prior to %HR_OFB_CTX_VW-LAST_DATE_WORKED%. Select the %AG_URL% to begin the OffBoarding process.
Thank you.
This is a system generated message. Do not reply to this message.

Available Text Placeholders

Value	Description
%AG_DETAILS%	Activity Guide Step Details
%AG_URL%	Activity Guide URL
%AG_USER%	Activity Guide User Description
%HR_OFB_CTX_VW-LAST_DATE_WORKED%	Last Date Worked
%PERSONAL_DATA-NAME_DISPLAY%	Display Name
%JOBCODE_TBL-DESCR%	Job Code Description

Activity Guide Template Assignment

- Enables organizations to assign an activity guide template to users based on a set of rules.
- Ability to define Search Records and Keys to be used in the assignment rules
- Granular controls to write assignment rules based on user-defined search records and fields
- Test page to validate Template Assignment rules for specific search fields
- Template Assignment rules access via PeopleCode API classes, that can be invoked at the time of template assignment.
- For new custom activity guides, it is customer responsibility to invoke template assignment APIs for dynamic assignment.

AG Composer Template Assignment

Enterprise Components > Activity Guide Composer > Utilities > AG Composer Tmplt Asgnmt

[< Define Notifications](#)

AG Composer Tmplt Asgnmt

General

Template Assignment

Template Assignment

SMC_LB_AGC1

*Description

Training AG Template Assignment

*Activity Guide Category

SMC_LB_AGC1

LB Training Activity Guide 1

Last Update User ID

LBALASUBRAMANIAM

Last Update Date/Time

05/11/2022 1:57:22PM

Search Keys ?

1-1 of 1

View All

*Search Key	Description	Source Foreign Key 1	Source Foreign Key 2	Source Foreign Key 3		
BUSINESS_UNIT	Business Unit	BUSINESS_UNIT			+	-

Save

Return to Search

Previous in List

Next in List

Add

Update/Display

General | Template Assignment

AG Composer Template Assignment

Enterprise Components > Activity Guide Composer > Utilities > Test Template Assignment

< General

Test Template Assignment

Test Template Assignment ?

Template Assignment SMC_LB_AGC1

Training AG Template Assignment

Required Fields to Retrieve Search Keys ?

1-2 of 2

View All

Source Table	Criteria Field	Field Long Name	Criteria Field Value
JOB	EMPL_RCD	Empl Record	0
JOB	EMPLID	Empl ID	KU0046

Assign Template

Template LBAGT01 LB Training Activity Guide 1

Clone Activity Guide Category

Enterprise Components > Activity Guide Composer > Utilities > Clone AG Composer Category

Workforce Administrator

Clone Category

Clone Category

New Category Details

*Category

SMC_LB_AGC2

*Effective Date

05/01/2022

*Description

New Cloned Category

*Long Description

New Cloned Category

Available Categories

12 rows

Category	Description	Effective Date
☐ HANDS	Health and Safety	01/01/1900
☐ HGA_EA_REQ	Extended Absence Request	01/01/1900
☐ HRADMIN	Human Resources Administrator	01/01/2000
☐ HR_JOBDATA	Job Data	01/01/1900
☐ HR_RWORK	Remote Worker Category	01/01/1900
☐ LIFEEVENT	Life Event	01/01/1900
☐ MANAGEPOSITION	Manage Positions	01/01/1900
☐ OFFBOARDING	OffBoarding	01/01/1900
☐ ONBOARDING	OnBoarding	01/01/1900
☐ OPENENROLLMENT	Open Enrollment	01/01/1900
☐ QST0000001	Create Questionnaire	01/01/1900
☒ SMC_LB_AGC1	LB Training Activity Guide 1	05/01/2022

Polling Questions

Do you use Activity Guide Notifications?

Do you use Automatic Template Assignment?

Activity Guide Migration

- **Use Data Migration Workbench for AG Composer and PT Activity Guide Configurations**
 - Application Data Sets
- EOAG_CATEGORIES - AG Composer Categories
- EOAG_TEMPLATES - AG Composer Templates
- EOAG_CONTEXTUAL_DATA - AG Composer Contextual Data
- EOAG_SRCH_KEY_DEFN - AG Composer Search Key Defn
- EOAG_TMPL_ASSIGNMENT - AG Composer Tmpl Assignment
- *ACTIVITY_GUIDE_ITEM – PT AG Item*
- *ACTIVITY_GUIDE_LIST – PT AG Item List*
- **Use Application Designer project for Related Service Definitions and other technical objects E.g. Application Packages, URL definitions etc.**

Questions?

THANK YOU!

This presentation and all
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be available for download from
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