



succeed

Alerts

A configurable framework
for implementing role-based
alerting and workflow



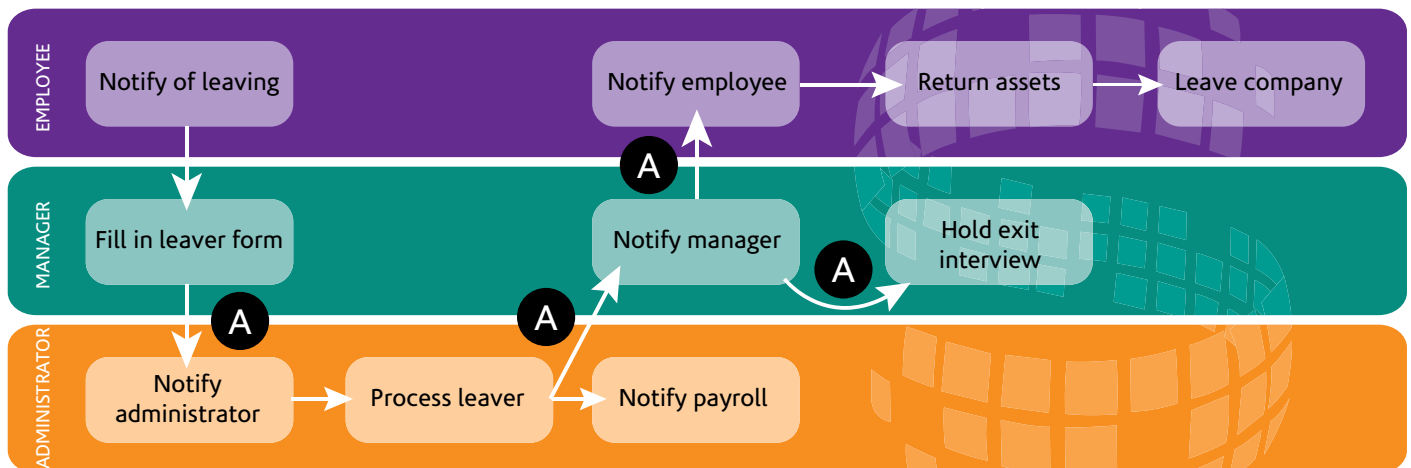
frameworks enhancements

Alerts framework

Overview of solution

The Alerts framework is a bolt-on enhancement for PeopleSoft that implements configurable role-based alerting and workflow functionality without customising delivered PeopleSoft objects. Alerts are triggered based on user-defined rules that interrogate transactional data anywhere within the PeopleSoft database, and the framework enables system process steps between different roles to occur seamlessly. The alerts are delivered to defined groups of users in near real time, and allow the users to drill down to the original transactions that triggered the alerts. The bolt-on nature of the framework means it can be isolated from delivered objects easily, allowing for trouble-free upgrades.

Example of a simple process where alerts could be used to facilitate transactional processing



A = Alert

Reasons for deploying Alerts

- You need to deliver role-based alerting but do not wish to customise delivered PeopleSoft objects.
- You wish to implement workflow based on specific and complex business rules that are not possible using delivered functionality without customisation.
- You wish to implement a simple and targeted reporting solution.
- You wish to ensure that all system-based process step transitions between roles are seamless, and that the process drives the system rather than the system driving the process.
- You wish to implement a method of escalation to administrators or higher-level management when process steps are not undertaken in a timely or efficient manner.



Key features of the Alerts framework

- The framework can be used to raise alerts against any type of transaction made anywhere within the PeopleSoft system.
- Alerts are displayed in a summary pagelet within the PeopleSoft portal or are delivered by email.
- The user is able to drill down on any alert to see more information about it and optionally to navigate directly to the underlying transaction that triggered the alert.
- The framework allows information-only alerts to be generated which do not reappear once dismissed by the user.
- Standard PeopleSoft security is employed to ensure users see only those alerts appropriate to their role.
- PeopleSoft multi-language features are used to deliver alerts in the user's local language.
- The Alerts framework can be used in conjunction with other Succeed frameworks to implement complex workflow-based business processes without customising delivered PeopleSoft objects.

Technologies Utilised

- The Alerts framework is built using standard PeopleSoft technology and can be implemented in PeopleTools version 8.40 and above. The user-defined rules that drive the Alerts framework use non-database-specific SQL.

Alternative Solutions, Technologies, & Products

Custom PeopleSoft Workflow

PeopleSoft provides tools to develop custom workflow processes that could be used in place of the Alerts framework, but implementing such processes would require customising delivered components. Other disadvantages of this approach are the specialist knowledge required to develop such processes and the lack of flexibility in the output compared to the Succeed solution.

Custom Alerts

It is also possible to create custom alerts that are displayed to a user on entry to the system, but each such alert would need to be developed independently, leading to long implementation times and requiring large numbers of custom objects to be created.

The main advantage of the Alerts framework over this technique is that alerts are fully configurable by administrators of the system and require no additional custom objects to be created.

Next Steps

If you wish to implement the Alerts framework a Succeed representative can prepare a solution estimate.

The solution estimate outlines the effort and cost associated with delivery of the framework along with a description of its deliverables, assumptions and known requirements. Once produced, the estimate can be used as input to further discussion about the scope of the solution and can be used by the client to drive planning and budget application processes.



For further information and/or to request a solution estimate, please contact your on-site Succeed representative, or contact the Succeed office on (01923) 711810 or via e-mail at info@succeed.co.uk.