



succeed

Dynamic Forms

A configurable framework
for implementing a direct
replacement for paper forms



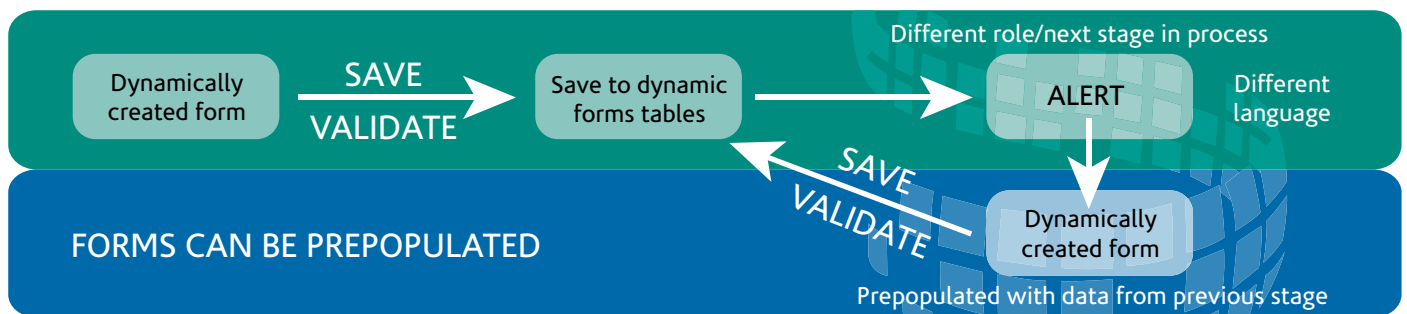
frameworks enhancements

Dynamic Forms framework

Overview of solution

The Succeed Dynamic Forms framework is a bolt-on enhancement for PeopleSoft that enables non-hierarchical data that cannot be captured elsewhere in the system to be entered, stored and processed. It is intended to provide an alternative to customising PeopleSoft pages and can also help the drive towards paperless processes by offering a direct replacement for paper forms. The bolt-on nature of the framework means it can be isolated from delivered objects easily, allowing for trouble-free upgrades.

Simple form processing



The “Advanced” processing includes all the features of the “simple” processing as shown above, but allows the form to have its contents sent via an Application Message to be consumed by a standard PeopleSoft Component:

Advanced form processing



Reasons for deploying this solution

- You want to replace paper forms by capturing, storing and processing data electronically.
- You need to store custom data within PeopleSoft without customising delivered objects.
- You want to implement a new business process without impacting the delivered system.
- You want to implement an alternative to delivered self-service pages without customisation.



Key features of the Dynamic Forms framework

- The framework allows an end-user to define the layout and content of a new custom form. The user can specify the type, position and label text of each field on the form, as well as defining the values allowed for each field.
- The framework is designed for capturing simple, non-hierarchical data, similar to that captured on a paper form.
- Fields can be made available only to certain groups of users, facilitating the implementation of approval-type processes.
- Forms can be accessed directly from hyperlinks placed on the home page.
- PeopleSoft security is used to ensure that users see only those forms which are appropriate to their role and which relate to employees they are allowed to see.
- Standard PeopleSoft multi-language functionality is used to deliver forms in each user's local language.
- Fields can be pre-populated, hidden, disabled or highlighted using pre-defined SQL-based rules.
- Data captured in a Dynamic Form can be used to update PeopleSoft components automatically on saving.
- The Dynamic Forms 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 Dynamic Forms framework is built using standard PeopleSoft objects and can be implemented in any PeopleSoft system using PeopleTools version 8.40 or above.
- The user-defined rules that control the appearance of Dynamic Form fields use non-database-specific SQL.

Alternative solutions, technologies and products

Custom Pages

PeopleSoft provides tools to develop custom pages that could be used in place of the Dynamic Forms framework, but each page would need to be developed and maintained separately. Using Succeed's solution an unlimited number of custom forms can be specified, implemented and maintained centrally via configuration, not customisation.

Customised pages

Pages can be customised to contain additional fields, but this requires development effort for each changed page and requires delivered objects to be changed.

Next Steps

If you wish to implement the Dynamic Forms 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.