PROLOGIS IS TOTALLY OWNING PEOPLESOFT WORKFLOW *(AND YOU CAN TOO!)*

BUILDING CUSTOM EFORMS TO TRANSFORM THE SUPPLIER SELF-SERVICE EXPERIENCE

SESSION ID 103200

PeopleSoft
RECONNECT
AT BLUEPRINT4D *LIVE!*

YOUR HOSTS

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Prologis

AGENDA

- Welcome and Introductions

- A Brief History of ~~Time~~ Business Systems

- Objectives for Including External Participants

- Business Case: Prologis Vendor Authorization

- And Now a Word from the Little Cogs that Made This Possible…

  - GT eForms™

  - GT Tokens

  - PS Public Portal

- More Real-World Implementations…

- Q&A

IntraSee | **GIDEON TAYLOR** | **newbury** ENTERPRISE SERVICES

GT eForms™ - Validated PeopleSoft Automation Solution

PeopleSoft Project Services

AI Digital Assistants

Process Optimization Analysis

PeopleSoft 'Keep Current' Services

Full-Stack Cloud Managed Services

Automation Centers of Excellence

Integrated / Automated Testing – PeopleSoft and Beyond

Robotic Process Automation

Build Grow Serve

Delivering on the Promise of Enterprise Technology

Helping clients envision and create custom solutions for PeopleSoft and other enterprise systems using eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, UX and conversational AI.

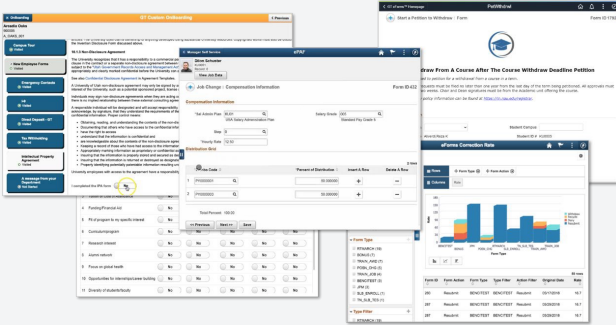## Founded in 2001, based in American Fork, UT

Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations

ORACLE | Partner   **UiPath™ Partner** SILVER

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Powerful Tools for Custom Automation

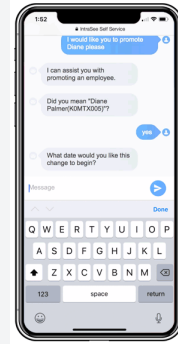
GT eForms™

Configuration-based form creation

Native ERP integration

Configurable routing, notifications

Attachment management

Edits, validations

Conditional logic

Ida Digital Assistant
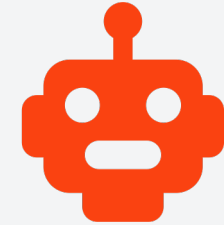
Enterprise-grade digital assistant

Uses machine learning AI

Built on Oracle's AI and Cloud

Multi-channel capable (Web, Teams, SMS)

Role-specific & personalized answers

Pre-built catalog of questions/skills/integrations

UiPath

UiPath™

Robotic Process Automation

Simulates Human Actions

Quick to implement

Enterprise scalability

Fills in forms, Moves files, Reads & enters data, Opens & sends emails

Enabling Smart PeopleSoft Automation

A BRIEF HISTORY OF ~~TIME~~ BUSINESS SYSTEMS

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OBJECTIVES FOR INVOLVING EXTERNAL PARTICIPANTS

- Electronic signatures on electronic forms
- Clear path of identity and transaction ownership
- No paper
- No manual administrative tasks
- No manual security tasks
- Completed AWE transactions
- Queryable data in PeopleSoft
- Ongoing access for authorized participants

CASE STUDY: PROLOGIS' SUPPLIER AUTHORIZATION FORM

ABOUT PROLOGIS

The World's Leader in Logistics Real Estate Solutions

Prologis' partnerships with our customers are essential to the flow of goods across the globe.

Prologis operates in 19 countries across the Americas, Europe and Asia.

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PROBLEM TO SOLVE

Prologis had recently implemented the Supplier Portal functionality within PeopleSoft Financials. This portal is a place for Suppliers to be able to register as new suppliers, make updates to their existing supplier profiles and view data such as invoice status, payment status and purchase order information. We had also recently removed an outsourced ACH provider and begun storing our own ACH information and executing our own Payments.

With these new processes and storage of sensitive data, we wanted to be sure we were inviting the right people to the portal and they were accepting responsibility for maintaining their own data.

Goals:

- Security - #1
- Simple way to initiate the process
- Intuitive form that provided guidance and validations throughout, to ensure we were getting the data we needed
- Eliminate dual entry during the form and new vendor registration processes
- Automated and dynamic workflow with external participants that did not have PeopleSoft logins
- Automated updates to supplier profile, without triggering unapproved status
- Triggering of 'Manage Invitations' based on region and language
- Multi-language form and email communications
  - French, Spanish, Czech, Slovakian, Hungarian, Swedish, Italian, English, German, Dutch, Polish

1

Prologis New / Update Supplier Contact Process
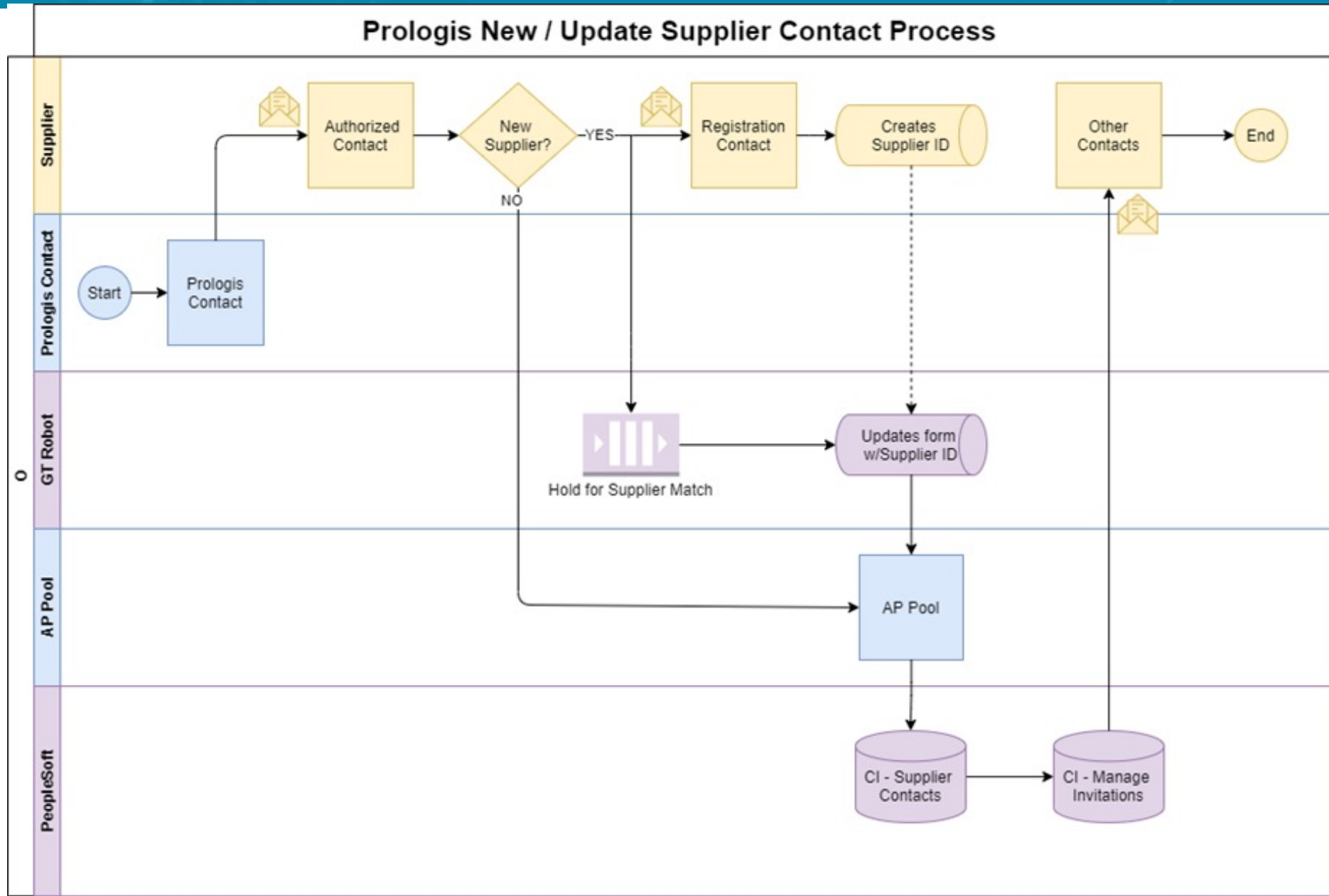
Prologis New / Update Supplier Contact Process
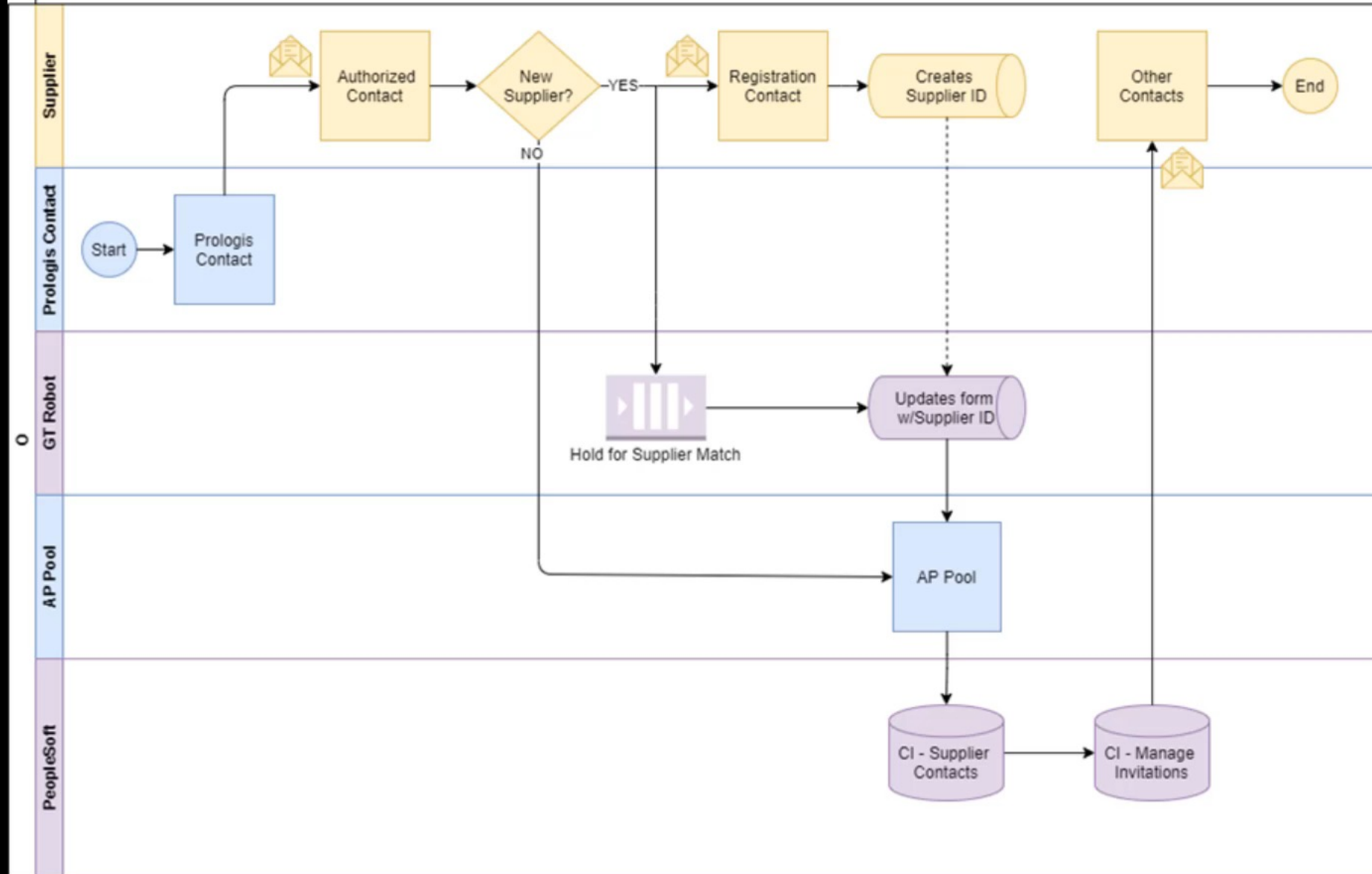
OUTCOME/RESULTS

Completed the form, with additional scope, ahead of schedule, in just 8 weeks (mid-Nov to mid-Jan).

Executed in two phases, to first make the form available and usable and then to automate the emails, matching and vendor updates.

So far, the business has sent over 1,600 forms, inviting our new and existing suppliers to share their contact and company data with us securely. Over 725 of them have completed the form, providing us over 1,100 contacts.

Time To Complete Form

Country	Time Elasped	Number of Forms
United States	Less than 1 Day	460
	1 to 5 Days	133
	Greater than 5 Days	68
Europe	Less than 1 Day	41
	1 to 5 Days	14
	Greater than 5 Days	12
Canada	Less than 1 Day	1

SO HOW DID WE DO THAT?? USING THESE TOOLS...
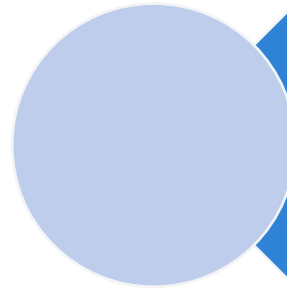
GT eForms™ – a bolt-on, config-based form building and workflow toolset for PeopleSoft
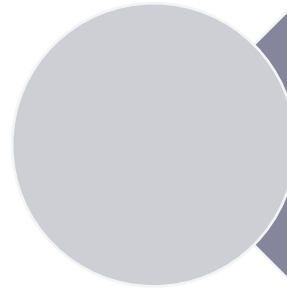
GT Token – a GT eForms™ feature that uses unique tokens to secure transactions

PS Public Portal Technology – this is available in every PeopleSoft product

TOOLS WE USED: GT EFORMS™

GT eForms™ – Unparalleled Automation

ORACLE
Validated Integration
PeopleSoft

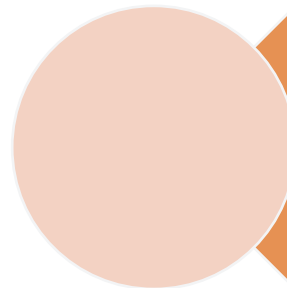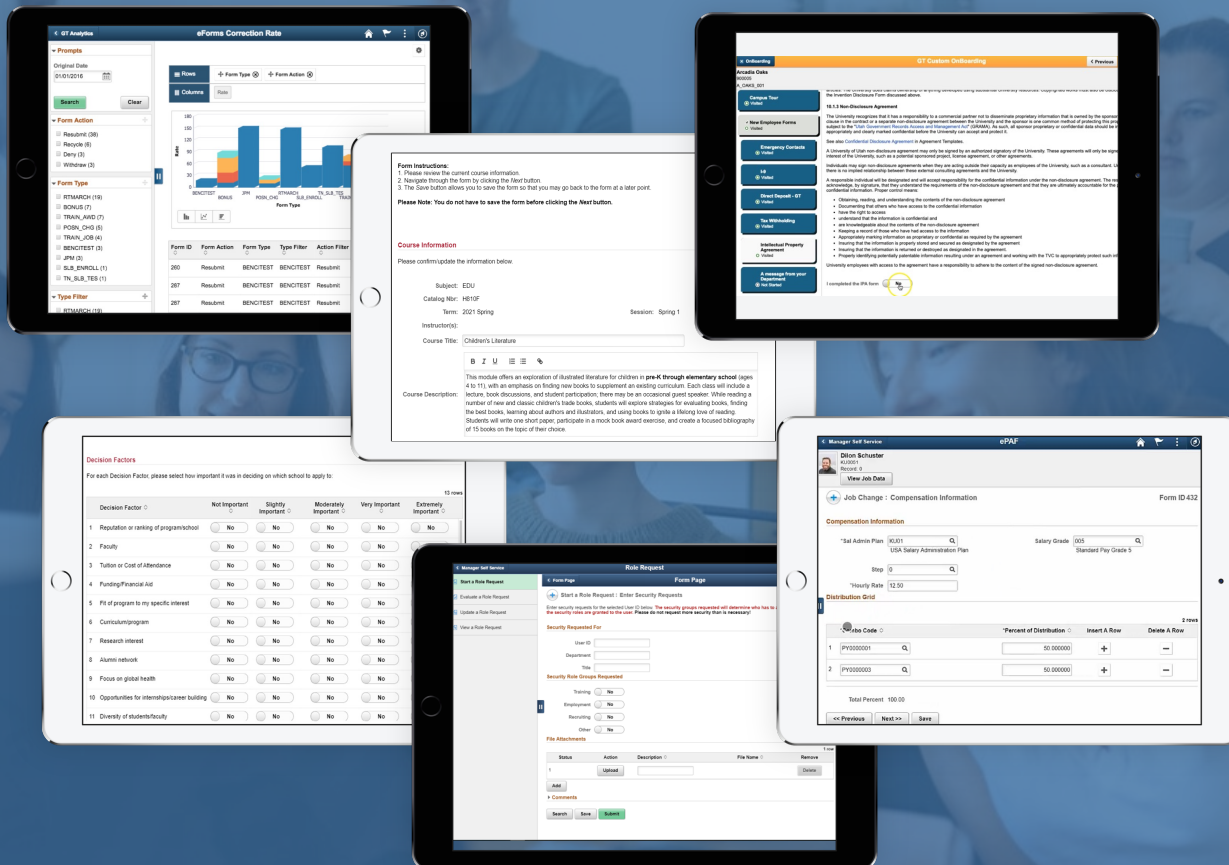## Build Configuration-based Custom Fluid Solutions

Configuration-based Form creation

Pre-Population

Conditional form behavior

Restricted valid values

Bulk actions

Attachment management

Configurable routing

Full PeopleSoft security

Edits & validations

Reporting & analytics

Transformative Results

- 700% Efficiency Increase

- Turnaround reduced from 5 days to 30 minutes

- Reduced manual intervention & errors to less than 1%

- Saved over 90% of time for new employee onboarding

- Direct year-on-year ROI over $300,000

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TOOLS WE USED: GT TOKENS

OBJECTIVES FOR INVOLVING EXTERNAL PARTICIPANTS

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PS Workflow (Approval Framework, or AWE) is Based on User ID

External participants don't have User IDs

Setting up User IDs takes lots of manual effort from administrative staff

Won't giving User IDs to external participants expose core system data?

THE PROBLEM

A token acts as an invitation to participate in a specific transaction

Send external participants a token authorizing them sign an eForm

Token lets them create their own self-service User ID

Token takes them to the eForm they need to sign

They sign with their own User ID

Their User ID can give them ongoing access to transactions they have tokens for

THE SOLUTION: TOKENS!

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- A token is a long unique identifier. (For example, *e572ccb4-6e58-11ea-b92b-e0b05cc96cdd*. Also known as a UUID or a GUID.) It is infeasible to guess or fake.

- A token can be associated inside the secure PeopleSoft system with an eForm-based transaction, a set of private data, a person's identity, whatever.

- The token itself can then be sent out into the big wide world, for example attached to an email link, without sending the data (for example, an SSN) that the token represents.

- The token can grant access to the private data, but it can also be set to expire, closing the window for bad actors to get to data they shouldn't.

WHAT IS A TOKEN?

GT EFORMS™
CONFIGURE TOKEN
SETUP

SOME THINGS YOU CAN DO WITH TOKENS

Allow non-authenticated users to participate securely in specific eForms transactions.

Create email links that expire after a specified amount of time.

Enable invitation-driven self-provisioning, so non-authenticated users can set up their own User IDs.

Daisy-chain form types, so a notification kicked off by one form type can include a link that starts a new form type, prepopulated with information from the first form.

Provide custom row- and transaction-level security to data. For example, a student could grant a parent access to see their student data, or only one specific form.

Email-based approvals, where clicking an Approve, Deny, or Recycle link completes the form action without logging into PeopleSoft.

Enabling certain form actions to take place outside firewalls or two-factor authentication restrictions.

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TOOLS WE USED: PS PUBLIC PORTAL

- How do you provide public content without…

  - Exposing secure information to the public

  - Opening a "back door" around authentication protocols for authorized users

  - Mixing up secure and public permissions

  - Creating a security management headache for PS and Web Admins

SECURITY IS KEY

- Present PeopleSoft content without requiring authentication to reach it

- Engage with user populations who do not yet have authentication

  o Applicants

  o Onboarding candidates

  o Vendors

  o Suppliers

  o Parents of students

- Allow business process workflow to include non-authenticated users

WHY A PUBLIC PORTAL?

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CUSTOMIZING THE PEOPLESOFT URL

```
Protocol                          Servlet Site        Content Type
[  ^  ][Host                     ][Port][^][ ^][Portal][Node][^][Menu    ] [Component    ][Mkt][Query String]
http://training.internal.eform.guru:8482/psp/ps/EMPLOYEE/HRMS/c/PORTAL_ADMIN.PORTAL_OBJ_LIST.GBL?
```

- New Menu / Permission List / Role: Restrict guest user to only see content as specifically deployed on the public portal

- New Portal: Group content navigation and security by user group with group-specific content references - New Portal Registry

- New Node: Restrict where content can display (Content references either use a specific node, or LOCAL_NODE, which can be seen on any local node)

- New Web Profile: Configure guest user, define dedicated RPS, custom start script & page

- New Weblogic Domain: New port, new servlets, new site

- New Site: Use the new guest-enabled Web Profile, potentially use separate app server (There is a process to create a site with a name other than ps)

- New Host Port: Isolate public traffic from secured traffic; ease of load-balancing, firewalling, proxying

REAL-WORLD EXTERNAL PARTICIPANT SOLUTIONS

Organization	Solution	Description	Access Method	GT Token	Public Portal
Prologis	Supplier Contact Registration	Supplier representatives can submit contact information to set up vendor access to the delivered Supplier Portal.	Token-authenticated Guest user	Yes	Yes, delivered Supplier Portal
UC Berkeley	Graduate Committee Approvals	Graduate committee members who are outside the organization can still participate in the committee approval process.	Auto-generated User ID, automatically logged in	Yes	Yes
Hennepin County	Citizen Recreational Vehicle Tag Renewal	Citizens can create their own self-service User ID that lets them pay renewal fees.	Public access to a self-provisioning page	No	Yes, self-provisioning only
Princeton Dean of Faculty	Faculty Onboarding	An email invite with embedded token allows candidates to securely enter personal info, enabling a search match and User ID creation.	Token-authenticated Guest user	Yes	Yes
Princeton Graduate School	Email-based Approvals for eForms	Authenticated users get HTML emails with links for Approve, Deny, and Recycle. Clicking a link opens a browser window informing them the action was successful - no login page.	Guest user, eForm action logged as authenticated User ID	Yes	Yes
Wakefern Food Corp	Employee Onboarding	An email invite with embedded token allows candidates to securely enter personal info, enabling a search match and User ID creation before Oracle-delivered Onboarding Activity Guide.	Guest user access until User ID is provisioned, then auto-switched to authenticated User ID	Yes	Yes

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