

SESSION #4904

5 PeopleSoft Maintenance Strategies for Universities with Limited Resources

Meet Your Presenter



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Recognition and Specializations



Oracle Specialized

ORACLE | Partner

Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

ORACLE | Expertise in
PeopleSoft
in North America

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

ORACLE | Expertise in
Oracle EPM Cloud
in North America

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

ORACLE | Expertise in
Oracle Cloud Platform
in North America

SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

ORACLE | Education
Reseller

SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

ORACLE | Public Sector
Addendum

Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified



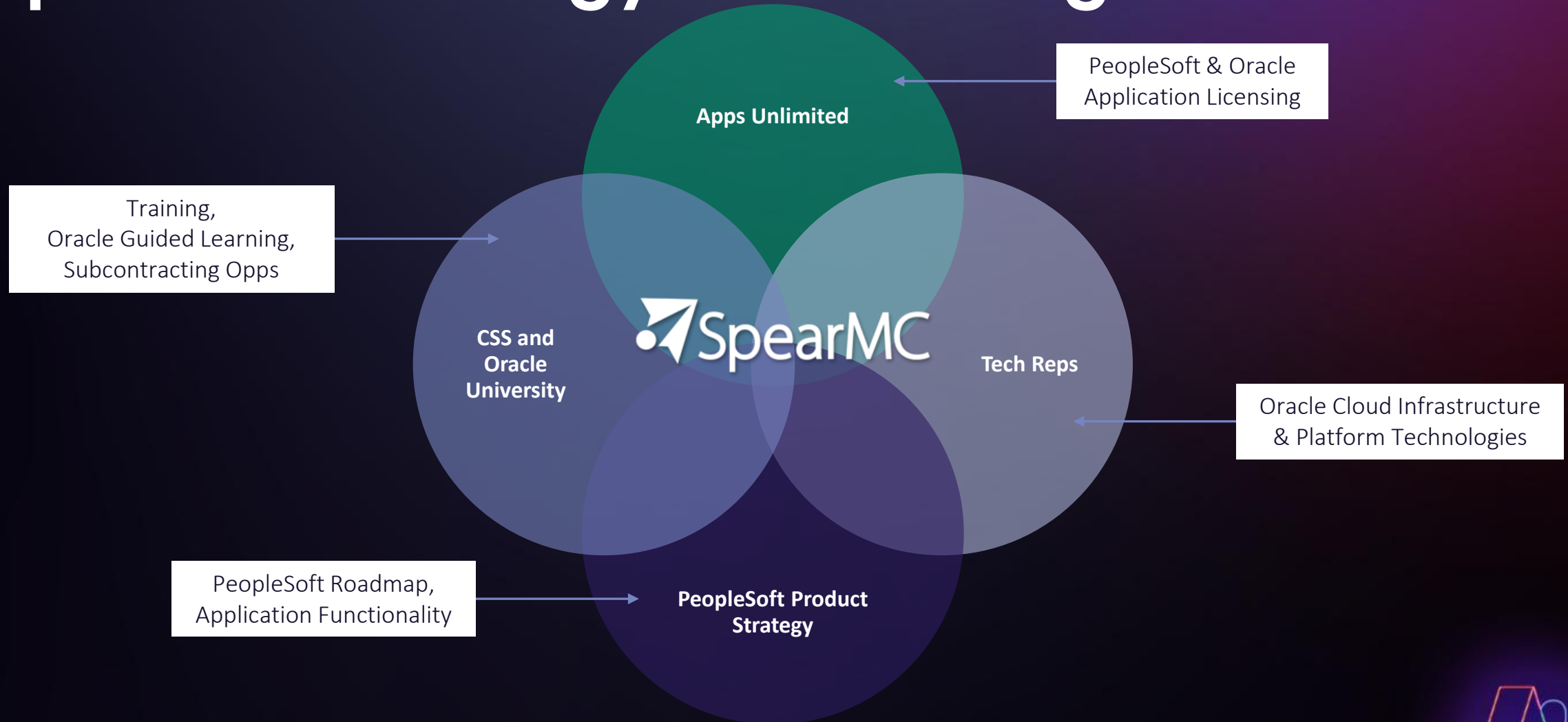
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor

Gartner[®]

SpearMC is the sole featured PeopleSoft vendor in the latest Gartner Market Guide for Oracle Professional Services.

SpearMC Strategy: Positioning with Oracle



Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



Managed Services

PeopleSoft
Administration

PeopleSoft
Functional Support

PeopleSoft Infrastructure

PeopleSoft Development



PeopleSoft Expertise

Financials and
Supply Chain

Human Capital
Management

Campus Solutions

Enterprise Performance
Management



PeopleSoft Training

All-Access Learning Pass

Live Private Training

Oracle Guided Learning

Public Training Classes



PeopleSoft Products

Segregation of Duties

Grants Labor
Cost Distribution

OGI Starter Kit

PTF Testing Grounds



Oracle Cloud

PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud Infrastructure

Cloud Learning
Subscriptions

ORACLE CONTRACT VEHICLES

Oracle Public Sector Addendum | Texas DIR | University of Texas System | E&I for Higher Education | CSU / Univ of CA / CCC | State of New York

PeopleSoft Training Opportunities

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will gain Powerful, Practical Learning Experiences covering PeopleTools, Financials and Supply Chain Management, Human Capital Management, PeopleSoft Campus Solutions:

- **PeopleTools:** System Administration, Fluid Development, Security, PeopleCode
- **Bootcamps:** FSCM, HCM, PeopleTools
- **Reporting:** Query, PTF, BI Publisher, PeopleSoft Insights
- **FSCM:** Fluid Approvals & Delegations, Expenses, Procurement & Supplier Contract Management
- **HCM:** Core HR, Payroll, Benefits
- **Campus Solutions:** Advisement, Admissions, Registration, 3C's



[Visit our website](#) or scan the QR code for a full listing of available public courses and free webinars

PeopleSoft All-Access Learning Pass

E&I Cooperative Services

Simplify Procurement of PeopleSoft
ERP Services and Training



Key Benefits

- SpearMC Consulting is the exclusive PeopleSoft partner available on the E&I contract
- Avoid costly and lengthy RFP cycles. The E&I contract was competitively bid and complies with your jurisdiction's procurement rules
- Membership for educational institutions to join the E&I Cooperative is at no cost to the institution
- Click [here](#) to determine membership



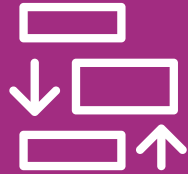
Scan the QR code
to learn more

Big System, Small Team:

How Higher Education Struggles with PeopleSoft



Shrinking
Teams



Competing
Priorities



Budget
Constraints



Increasing
Complexity



Compliance
Pressure

Learning Objectives

1. **Learn 5 actionable maintenance strategies**
2. **Understand how to prioritize key maintenance tasks**
3. **Gain insights into balancing in-house efforts with external support**

Strategy 1

Prioritize Preventative Maintenance

How to Make Preventative Maintenance Work



Regular
Schedule



Automate
Health Check



Monitor
Logs



Document
Footprint



Train
Staff

What Happens without Preventative Maintenance?



Unplanned
Downtime



Undetected
Vulnerability



Long
Resolutions



Higher
Cost

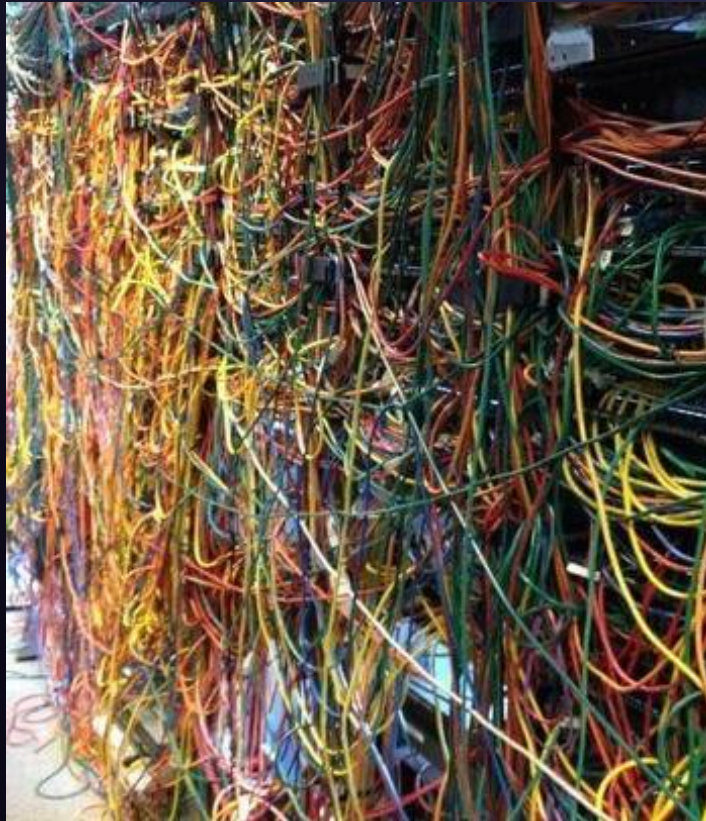


Compliance
Issues

Strategy 1 – Prioritize Preventative Maintenance

Strategy 2

Leverage PeopleSoft Configuration Over Customization



How to Reduce Customizations Without Losing Functionality



Audit
Customizations



Utilize
Delivered



Stay
Current



Maintain
Alignment

Strategy 2 – Leverage PeopleSoft Configuration Over Customization

What's the Real Cost of Customization

Key Cost Factors

- Initial Development
- Testing & Maintenance
- Upgrade
- Security & Compliance
- Performance Overhead

Customizations add incremental cost each year.

Fewer customizations = Lower Long-Term Cost

Organizations with customization may spend 2x more than those with less customization

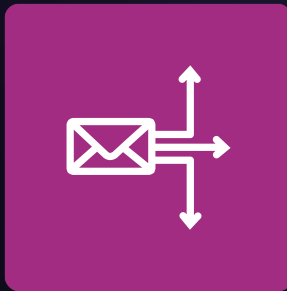


Strategy 2 – Leverage PeopleSoft Configuration Over Customization

Strategy 3

Optimize Support with Smart Workflows

How to streamline PeopleSoft Support



Automate
Triage



Self
Service



Train
Staff



Implement
OGL

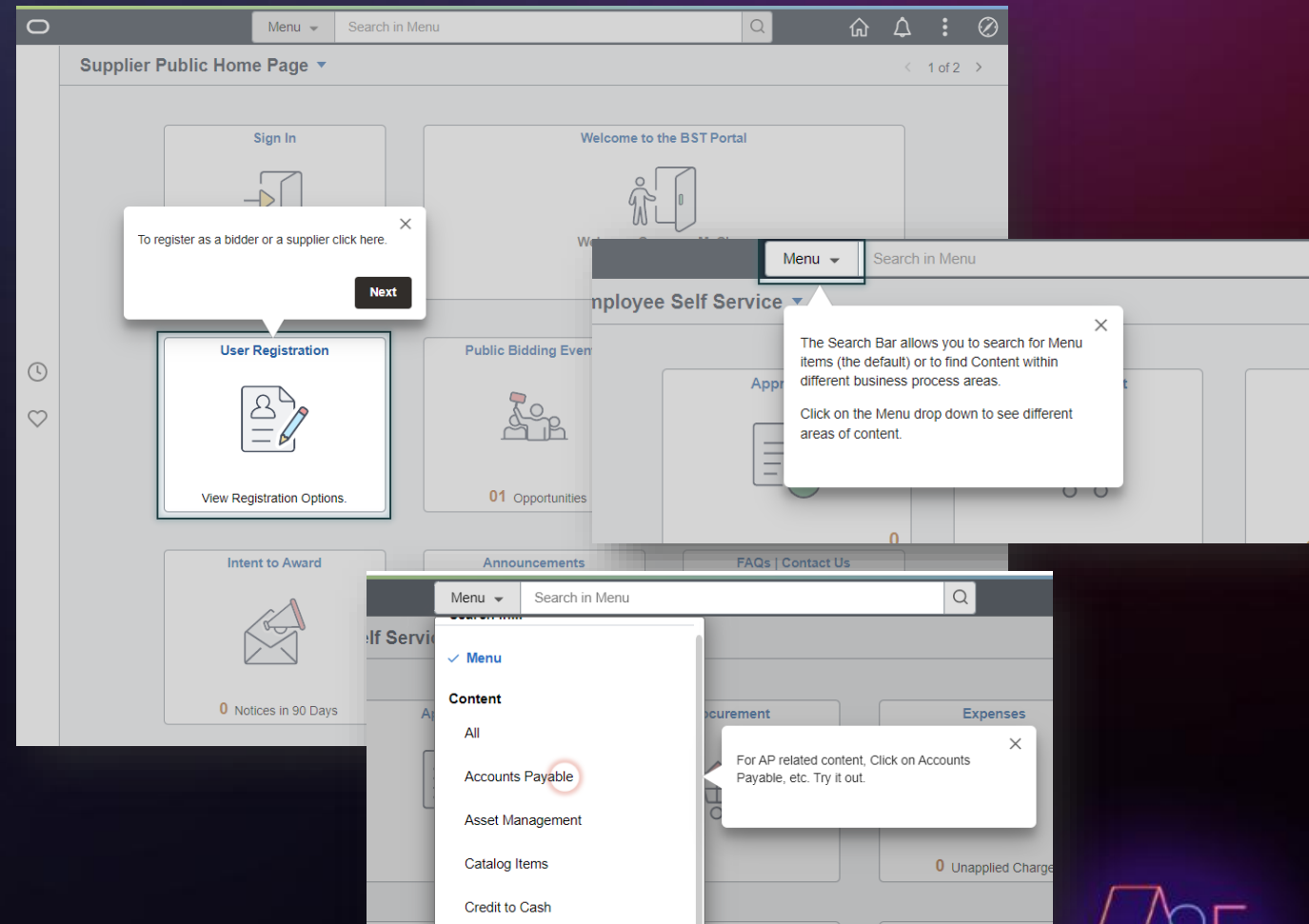
What is Oracle Guided Learning?

In-application guidance to accelerate PeopleSoft adoption

Oracle Guided Learning provides guided processing, messages, task lists, and more to help you influence user behavior and reduce support tickets.

- Immediate **productivity** from day one
- Reduces **Support** and **Training** costs
- Easily **configured** and **personalized**
- Easily **maintained** and **updated**
- Learning and guidance **in the flow of work**, converging learning and business process docs
- Pre-Built Content: **SpearMC Starter Kit** accelerates implementation
- Initially developed to support Oracle SaaS Applications. Now supports PeopleSoft.

Strategy 3 – Optimize Support with Smart Workflows



What is Oracle Guided Learning?

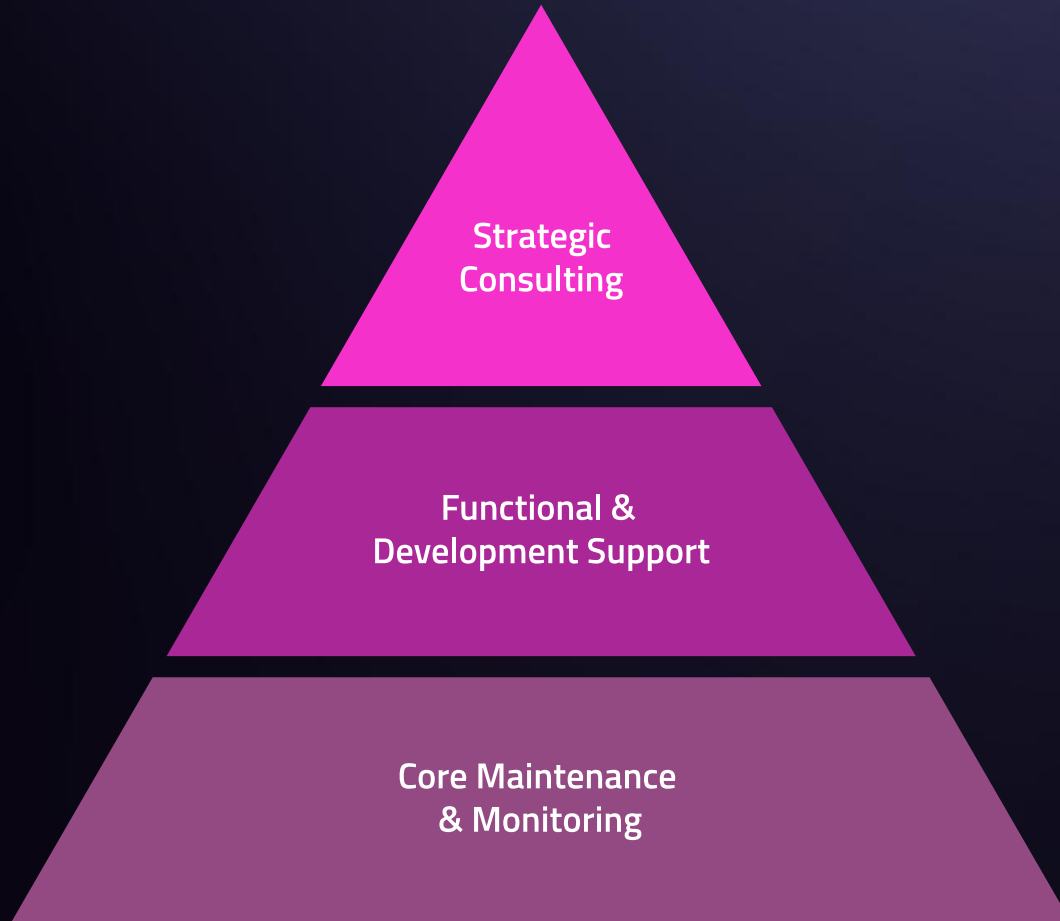
Go see the session!

March 12 th	9:00 AM – 10:00 AM	Customer Panel: How Oracle Guided Learning Has Transformed Customer's Views	Cameron McClurg	4825
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Strategy 3 – Optimize Support with Smart Workflows

Strategy 4

Partner Selectively for Support



Tier 1: Keeping PeopleSoft Stable & Secure

- 24/7 system monitoring & health checks
- Routine patching & security updates
- Incident management & SLA-backed support

Tier 2: Evolving with Business Needs

- Break/fix resolution for PeopleSoft modules
- Assistance with PUM updates & regression testing
- End-user support & knowledge transfer

Tier 3: Strategic Consulting & Project-Based Support

- PeopleSoft roadmap development & optimization
- Process reengineering & business transformation
- Custom development & advanced integrations

Choosing the Right Balance: Internal vs. External Support

Keep In House	Outsource Strategically
Daily System Monitoring	Security Audits & Compliance
User Support & Training	PUM Updates & Patches
Core Configuration	Cloud Infrastructure Support
Customizations (if necessary)	Disaster Recovery Planning

Strategy 4 – Partner Selectively for Support

PeopleSoft Support Services: Understanding Your Options



PeopleSoft Administration

Boost system performance
and operational efficiency.



PeopleSoft Development

Optimize, maintain, and support
your PeopleSoft systems.



PeopleSoft Functional

Streamline processes
and optimize workflows.



PeopleSoft Governance

Ensure compliance
and mitigate risk.



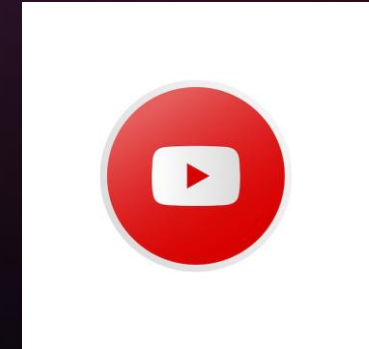
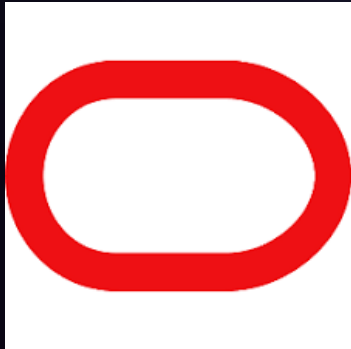
PeopleSoft Infrastructure

Keep your systems running
efficiently and securely.

Strategy 4 – Partner Selectively for Support

Strategy 5

Maximize Free & Low-Cost PeopleSoft Resources



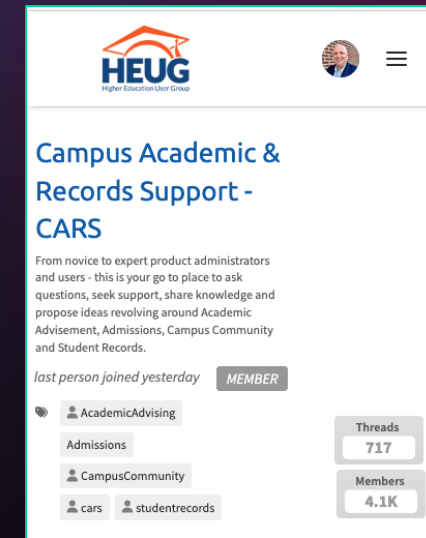
PeopleSoft Resources You Should Be Using



Peoplesoftinfo.com



SpearMC AALP



HEUG Communities

Strategy 5 – Maximize Free & Low-Cost PeopleSoft Resources

5 PeopleSoft Maintenance Strategies for Universities with Limited Resources

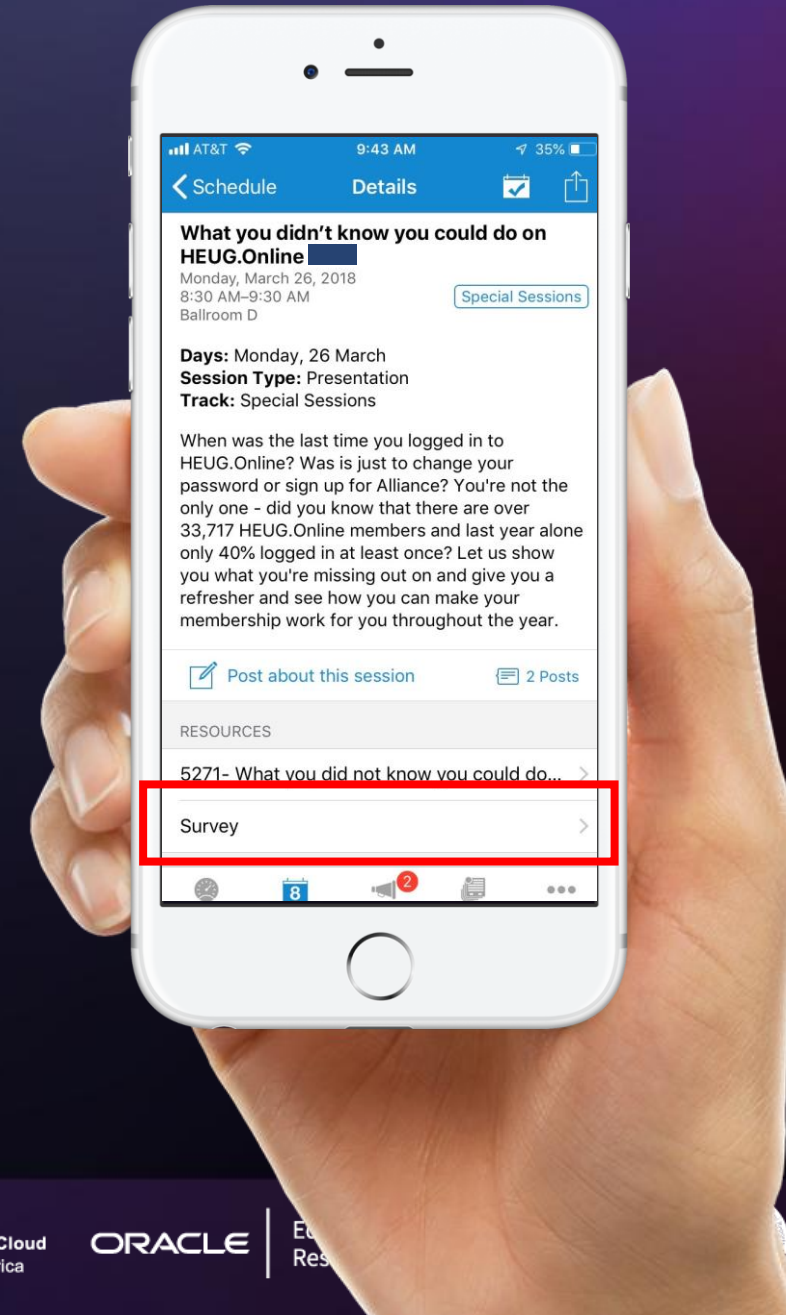
1. **Prioritize Preventative Maintenance**
2. **Leverage PeopleSoft Configuration over Customization**
3. **Optimize Support with Smart Workflows**
4. **Partner Selectively for Support**
5. **Maximize Free & Low-Cost PeopleSoft Resources**

Questions?

Session Surveys

1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the "Resources" button and "Survey"

You will be required to login once with your Eventsential username and password.



THANK YOU!

SpearMC Sessions at Alliance

Date	Time	Session Title	Presenter	Session #
March 10 th	1:30 PM – 2:30 PM	The Cloud Advantage: How OCI Reinvents PeopleSoft for University IT Teams	Joe Finlinson	4908
March 11 th	11:00 AM – 12:00 PM	Deep Dive into New Grants Functionality - PUM 42 – 51	Jessica Mann	5057
March 11 th	1:30 PM – 2:30 PM	Optimizing Student and Employee Journeys with the power of Activity Guides	Logesh Balasubramaniam	5208
March 11 th	3:30 PM – 4:30 PM	5 PeopleSoft Maintenance Strategies for Universities with Limited Resources	Joe Finlinson	4904
March 12 th	9:00 AM – 10:00 AM	Customer Panel: How Oracle Guided Learning Has Transformed Customer's Views	Cameron McClurg	4825

2025 Training Calendar

Upcoming Class Schedule



Date	Session
March 12	PeopleSoft 9.2 Query Basic & Intermediate for HCM
March 13	PeopleSoft 9.2 Query Advanced for HCM
March 17 - 20	PeopleTools System Administration
April 8	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
April 9	PeopleSoft 9.2 Query Advanced for FSCM
April 15	PeopleSoft 9.2 Campus Solutions: Student Records & Registration
April 16	PeopleSoft 9.2 Campus Solutions: Academic Advisement
April 16	PeopleTools Security (Functional) for FSCM & HCM
April 17 - 18	PeopleTools Security (Technical) for FSCM

Visit our [website](#) for more information

2025 Training Calendar

Upcoming Class Schedule



Date	Session
April 22	HCM Bootcamp – Core HR
April 23	HCM Bootcamp - NA Payroll
April 24	HCM Bootcamp – Benefits Administration
April 23 - 24	Using PeopleSoft with Cloud Manager on OCI
April 29	PeopleSoft 9.2 Campus Solutions: Admissions Applications
April 30	PeopleSoft 9.2 Campus Solutions: 3Cs
April 29 - 30	PeopleSoft Insights with OpenSearch Technologies
May 6	PeopleSoft 9.2 Query Basic & Intermediate for HCM
May 7	PeopleSoft 9.2 Query Advanced for HCM
June 3	Automated Testing with PeopleSoft Test Framework

Visit our [website](#) for more information