

SESSION #5208

Optimizing Student and Employee Journeys with the power of Activity Guides

Meet the Team



Logesh Balasubramaniam

Managing Director

- *PeopleSoft HCM, ELM, HR HelpDesk*
- *Higher Ed, Healthcare, Public Sector*
- *Specialize in strategy, planning and execution of HCM transformation projects*

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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



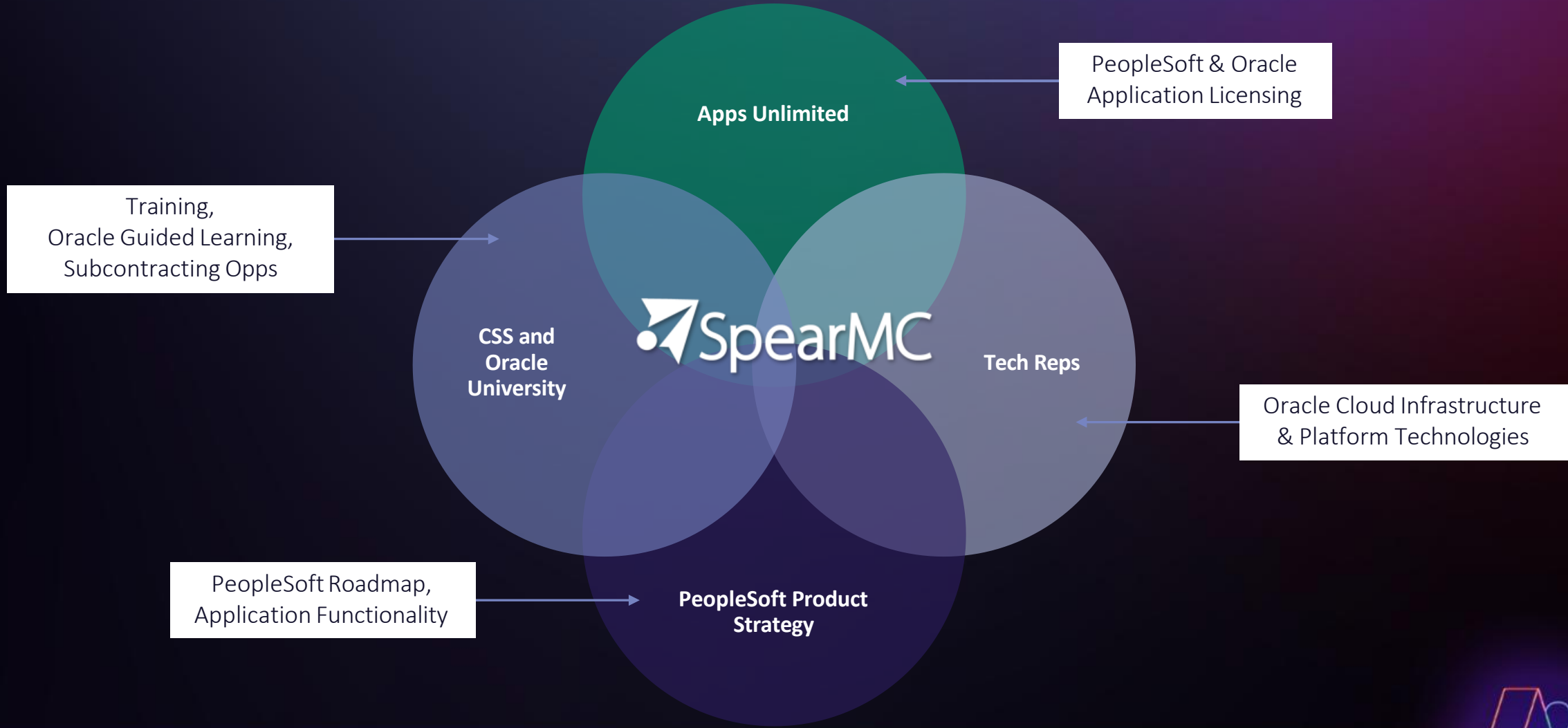
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



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

PeopleSoft All-Access Learning Pass



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

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

HEUG Sponsor since 2014



Activity Guides

Fluid Activity Guides provide a simplified and streamlined approach to completing multi-step processes.

✕ Exit

OnBoarding for USA



David Ho
Senior Financial Analyst

< Previous

Complete

Ethnic Groups

☐ Not Started

Documents

☐ Not Started

Attachments

☐ Not Started

▶ Personal Details

☐ Not Started

▶ Talent Profile

☐ Not Started

▶ Benefits

☐ Not Started

▶ Payroll

☐ Not Started

Summary

☒ Visited

Summary

To finish the OnBoarding process, please select the **Complete** button.

Steps

25 rows

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 - Fluid

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

FSCM - Fluid

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

Activity Guides

Campus Solutions - Fluid

- Global Chatbot Configuration
- Questionnaire Framework
- Registration

Campus Solutions - Classic

- Financial Agreement
- Emergency Contacts Verification
- Make a Payment
- Class Search and Enroll
- Accept Offer
- Drop Classes
- Decline Offer
- Update Classes
- Swap Classes
- Application for Graduation

Custom Use case – Annual Policy Acknowledgement

✕ Exit

Employee Acknowledgement

Next >

1

Mission and Statement of Faith
Complete

2

Working Well Employee Handbook
Complete

EXPECTATIONS FOR MINISTRY EMPLOYMENT

As an employee of [REDACTED]

- I acknowledge that the Lord Jesus Christ is my personal Savior and that I am a personal representative of Him.
- I understand that BGEA is a Christian organization whose purpose is proclaiming the message of the Gospel of the Lord Jesus Christ throughout the world.
- I agree that the purpose of my employment with BGEA is to further its Christian purpose, that I am prepared to assist in accomplishing that purpose, and that my role with BGEA plays a vital part in carrying out its Christian purpose and mission.
- I understand that I must exhibit conduct that is consistent with BGEA's expectations, whether at work or away from work, in keeping with scriptural teachings and principles as set forth in God's Word, BGEA's Statement of Faith, and BGEA's policies including Christian Conduct.
- I understand that BGEA has the right and the responsibility to ensure that its Christian religious purpose is carried on with the highest standards and is not harmed or impeded by conduct that is inconsistent with the Bible, BGEA's Statement of Faith, its Christian religious purpose, or its policies.
- I understand that any of my conduct which is not in keeping with the scriptural teachings and principles as set forth in God's Word, BGEA's Statement of Faith, and BGEA's policies, is inconsistent with BGEA's Christian religious purpose.
- I understand that if my conduct is determined by BGEA to be inconsistent with its Christian religious purpose, the result will be corrective action up to and including termination from employment.

☒ I have reviewed the Mission, Statement of Faith, and Expectations for Ministry Employment document. I understand that abiding by the contents of the document is a requirement of my continued employment with the Billy Graham Evangelistic Association.

Acknowledgement Details

User ID [REDACTED] Name [REDACTED]

Date/Time Stamp 03/04/2022 1:12:47PM

Custom Use case - Continued

✕ Exit

Employee Acknowledgement

< Previous

1

Mission and Statement of Faith
Complete

2

Working Well Employee Handbook
Complete

Step 2 of 2: Working Well Employee Handbook

Step 1 - Download Documents

Please download and read the document(s) listed below. You must download the document(s) before proceeding to step 2.

Document / Description	File Name	Action
Working Well Employee Handbook Working Well Employee Handbook	HR_Working_Well_Handbook.pdf	✓ Download

Step 2 - Acknowledge / Upload Required Documents

You must acknowledge the listed document(s). When you acknowledge the document(s), you are agreeing to comply with the contents of the document.

Document / Description	File Name / Attached On	Action
Working Well Employee Handbook Working Well Employee Handbook	HR_Working_Well_Handbook.pdf	✓ Acknowledge 03/04/2022 1:21:04PM

Use Case – Return to office survey

Exit

Covid 19 Return to Work

Mark Complete

Next >

1 Covid19 Survey Visited

2 Acknowledgement Visited

3 Attachments Visited

Step 1 of 3: Covid19 Survey

As Covid19 restrictions begin to lift across country, we would like to evaluate your comfort and opinions in returning to office. Your health and well-being are of utmost importance to us.

Save Answers

*1. How comfortable do you feel returning to work in the office?
☐ Very Comfortable
☒ Somewhat Comfortable
☐ Somewhat Uncomfortable
☐ Very Uncomfortable

*2. Which of the following are concerns you have about returning to work in the office? (Select all that apply.)
☒ Decreased Flexibility to work from home
☐ Getting exposed to Coronavirus
☐ Leaving family members at home who need assistance
☐ Organizing Childcare
☐ Having family member who are vulnerable to exposure
☐ No specific concerns
☐ Other Concerns
Please specify

*3. Which of the following would you be upset if implemented when

Exit

Covid 19 Return to Work

Mark Complete

< Previous

Next >

1 Covid19 Survey Visited

2 Acknowledgement Visited

3 Attachments Visited

Step 2 of 3: Acknowledgement

I am able to return physically to campus and, to the best of my knowledge, I do not have COVID-19 or symptoms of COVID-19, and have not had contact with anyone who has been diagnosed with COVID-19 or who has symptoms of the virus within the last 14 days.

Covid19 Symptoms

☐ I Agree

Save

Custom Use Case

×

Exit

Demo Student Guided Process

LBALASUBRAMANIAM

Mark Complete< PreviousNext >Submit

1Welcome VideoVisited

2Policy AcknowledgementVisited

3Emergency ContactNot Started

4My Contact DetailsNot Started

5Student SurveyNot Started

6SummaryNot Started

Step 2 of 6: Policy Acknowledgement

Save

I understand that as a teacher candidate, in order to comply with policies and state law:

I must have a cleared TB test on file at the Student Health Center to be in the field.

I must submit a paper copy of the Child Protection Registry Form to the Office of Clinical Studies to be in the field.

I must have a current State of Delaware and federal criminal background check (CBC) on file at the Office of Clinical Studies by the first day of the semester when I am taking a course with a field placement.

It may be necessary for the Office of Clinical Studies to share the above information when appropriate with designated school officials and/or program coordinators when securing field placements.

The Delaware Center for Teacher Education has access to my student conduct records from the Office of Student Conduct during my program.

OCS may take into consideration my student conduct records when determining my eligibility for a field placement.

If I know or suspect that there is or may be an issue with my criminal background check or student conduct record, I will contact the Office of Clinical Studies at (302)831-6778 or clincialstudies@udel.edu immediately.

[Terms and Conditions](#)

☐ I Agree to the terms outlined above

Activity Guide Demo



Activity Guide Features

Peoplesoft and non-Peoplesoft content as steps

Support for Videos, Images and rich HTML content

Document management framework

Policy Acknowledgements

Questionnaire surveys

Multi-user guides

Due dates and dependency management

Email Notifications

Automated template assignment rules

Activity Guide Composer Framework

AG Category

- Technical configuration that are pre-requisites to create and deploy activity guides

AG Templates

- Configurable templates to create different variations of guided processes within a category

AG Notifications

- Configurable notifications that can be assigned to specific activity guide events

AG Template Assignment

- Configuration to automate template assignment based on business rules

AG Instance Management

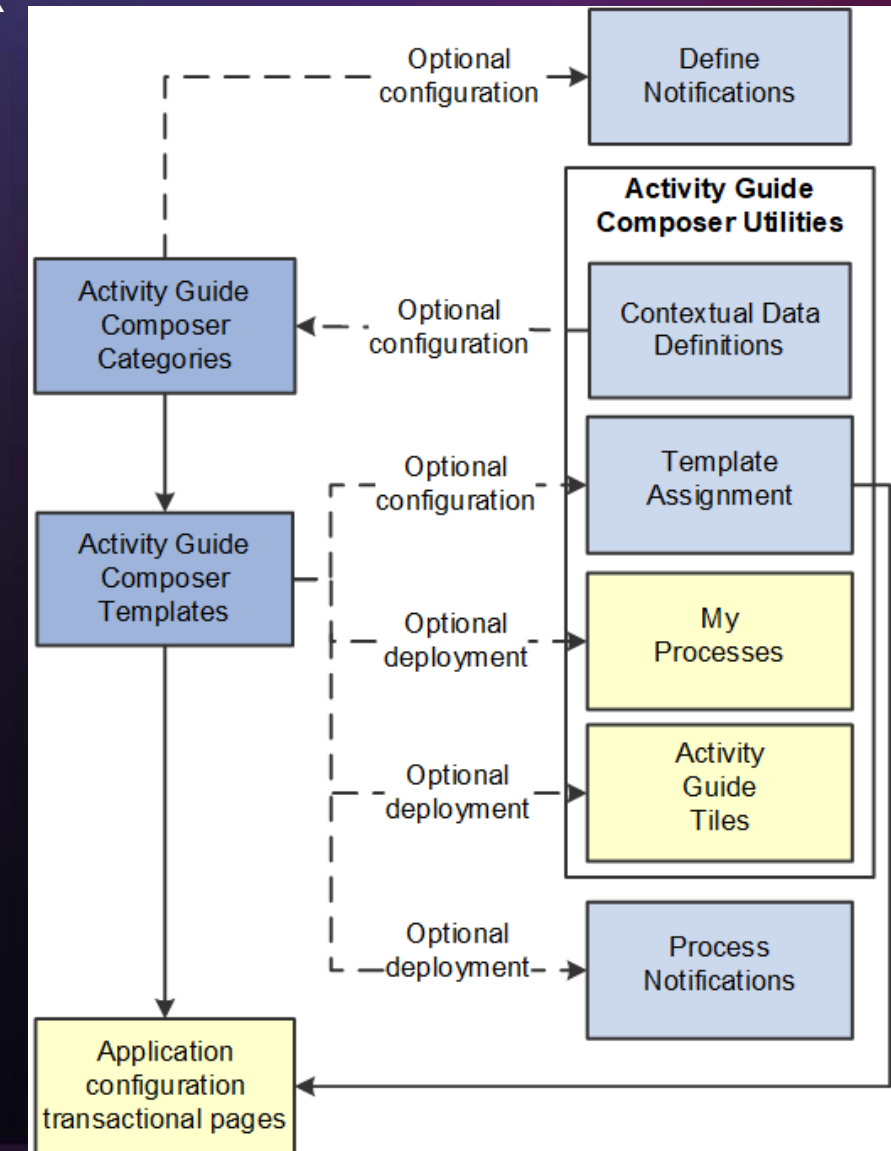
- Monitor and administer individual Activity Guide instances



Activity Guide Framework

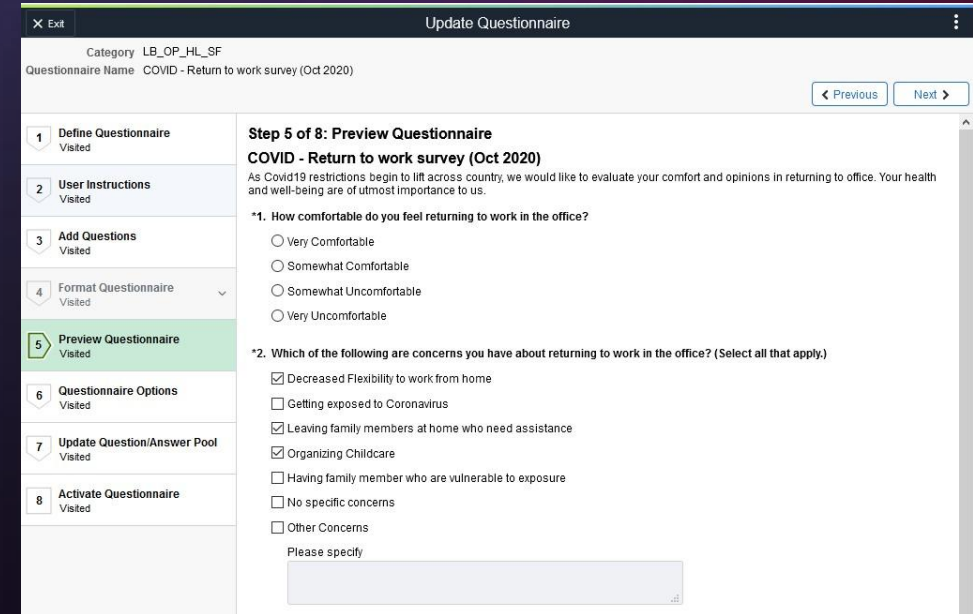
- **Comprehensive Framework to simplify and streamline processes**
- **Predominantly configuration driven, while initial setup requires technical work**
- **Multiple business processes delivered using Activity Guides – Onboarding, Offboarding, Life Events, Open Enrollment, Job Application**
- **Core component of modernization of complex classic process – Position, Job, Performance etc.**

Understanding Activity Guides



Questionnaire Framework

- **Configurable framework to create surveys**
- **Basic constructs to create questions and answers**
- **Maintain reusable pool of question, answers and smart answers**
- **Delivered use cases – Onboarding, Off-boarding, Benefits**
- **A survey needs to be associated with an Activity Guide for deployment**



Update Questionnaire

Category: LB_OP_HL_SF
Questionnaire Name: COVID - Return to work survey (Oct 2020)

Step 5 of 8: Preview Questionnaire
COVID - Return to work survey (Oct 2020)
As Covid19 restrictions begin to lift across country, we would like to evaluate your comfort and opinions in returning to office. Your health and well-being are of utmost importance to us.

***1. How comfortable do you feel returning to work in the office?**

☐ Very Comfortable
☐ Somewhat Comfortable
☐ Somewhat Uncomfortable
☐ Very Uncomfortable

***2. Which of the following are concerns you have about returning to work in the office? (Select all that apply.)**

☒ Decreased Flexibility to work from home
☐ Getting exposed to Coronavirus
☒ Leaving family members at home who need assistance
☒ Organizing Childcare
☐ Having family member who are vulnerable to exposure
☐ No specific concerns
☐ Other Concerns

Please specify

Understanding Questionnaire Framework

Acknowledgement Framework

- **Configurable framework to capture acknowledgements**
- **Construct the acknowledgement agreement and audit fields**
- **Delivered use cases – Onboarding, Off-boarding, Benefits**
- **Acknowledgement needs to be associated with an Activity Guide for deployment**
- **Understanding Acknowledgement Framework**

Acknowledgement Configuration

Acknowledgement ID LBCVD

Acknowledgement Details

*Effective Date 09/27/2020 *Status Active [Preview](#)

*Description Covid19 Free Acknowledgement Short Description CovidFree

Long Description Covid19 Free Acknowledgement for return to work

*Category LB_OHS Operational Health and Safety

Acknowledgement Fields

Sequence Number	Field Name	Field Label	Edit Value	Field Alignment	Required
1	TEXT_BOX1	Text Area 1			☐
3	TERMS_HYPERLINK	Covid19 Symptoms		Left	☐
4	AGREE_CHECKBOX	I Agree		Left	☐

Audit Trail Details

*Section Header Audit Details

Audit Trail Fields

Field Name	Field Label	Enable	Display
USER_ID	User ID	☒	☒
DTTM_STAMP	Date/Time Stamp	☒	☒
IP_ADDRESS	IP Address	☐	☐

Verify Identity

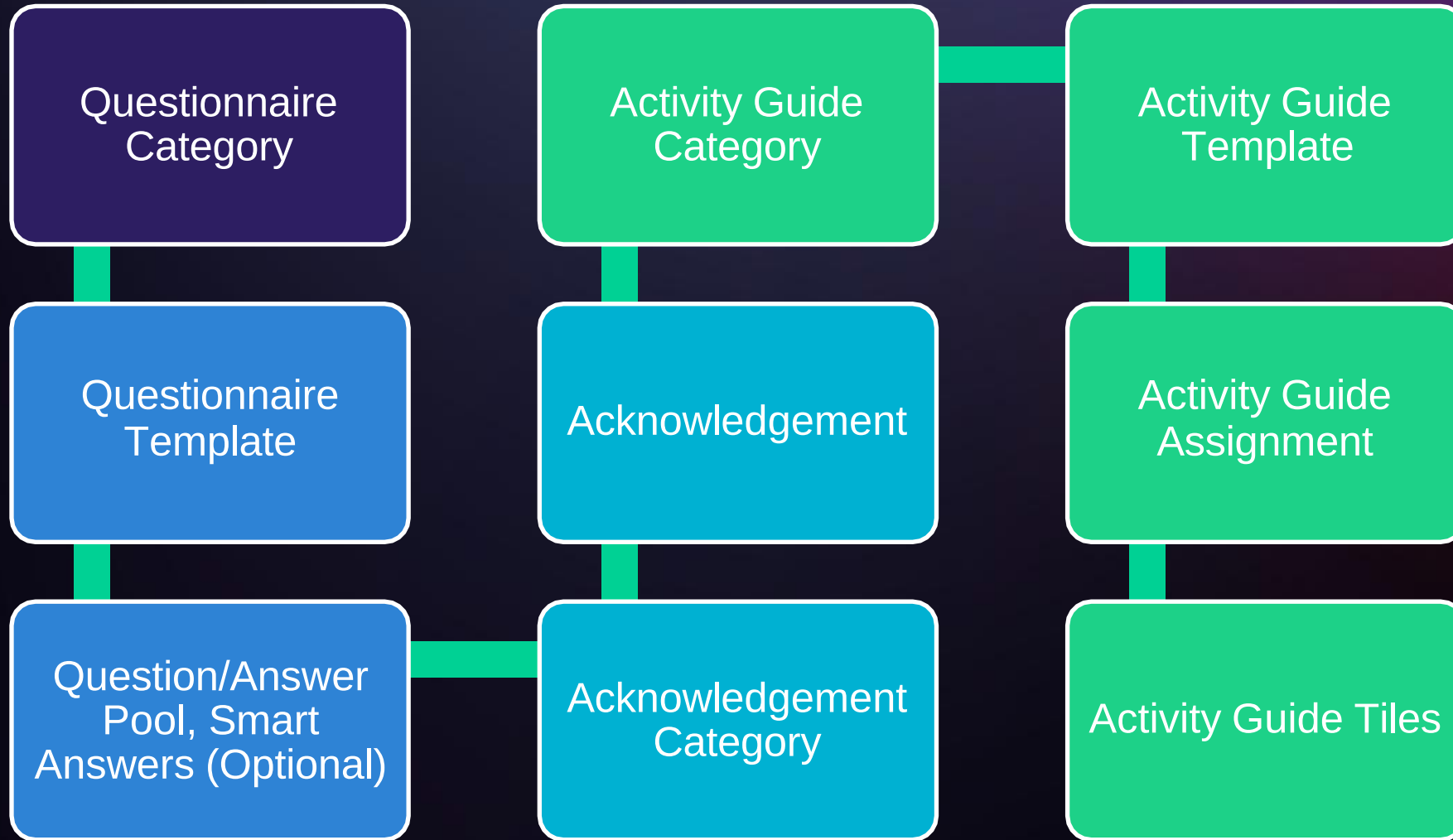
☐ Enable Verify Identity

Save Return to Search Previous in List Next in List Add Update/Display Include History Correct History

Activity Guide - Resources

- **Playbook to create and deploy custom Activity Guides -** <https://youtu.be/lqLSIkZn4hA?si=byuhLQLBHy20ZJRm>
- **PeopleSoft Spotlight Series: HCM Activity Guide Composer -** https://youtu.be/dYz5_y6DXk0?si=gW6Lf3HcHdTcv2Wt

Deployment Process

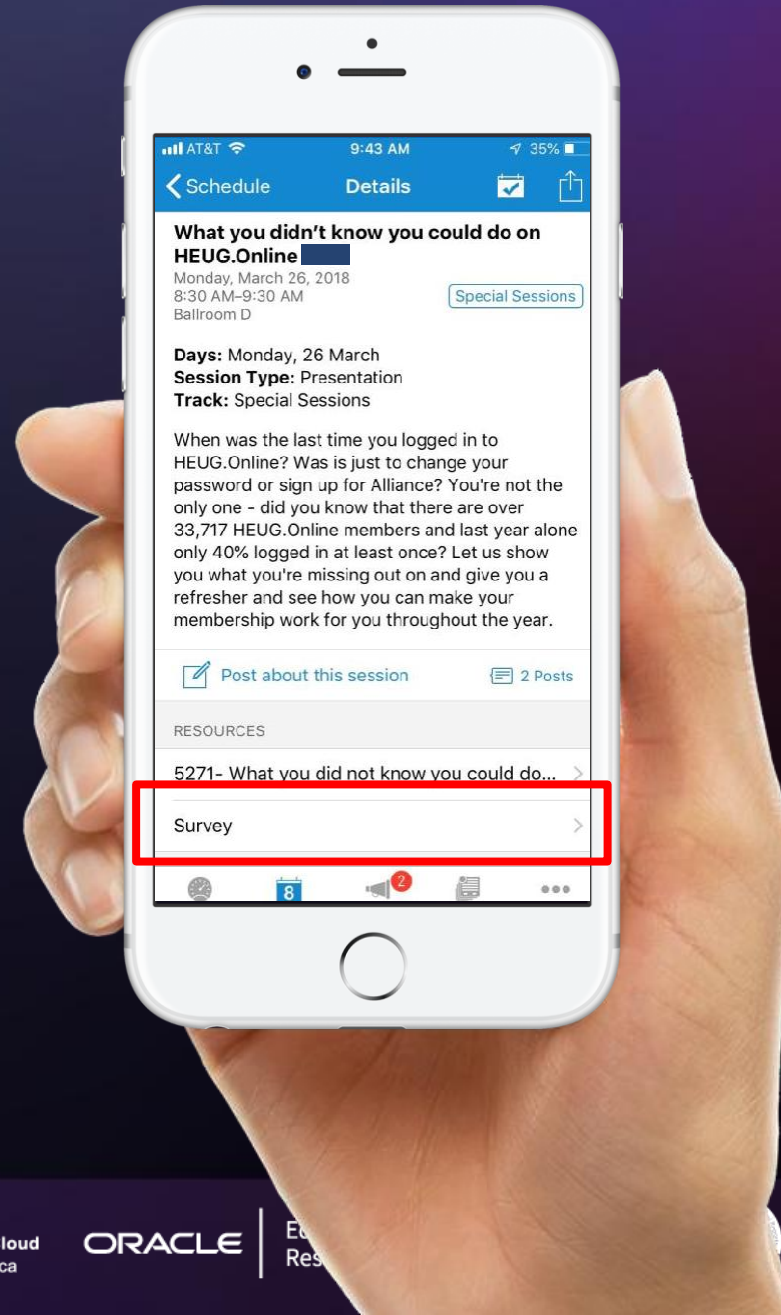


THANK YOU!

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.



Questions?

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