

SESSION #4825

How Oracle Guided Learning Has Transformed Customer's Views on "Training"

Meet Your Presenter



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Certifications: PeopleSoft, Oracle Guided Learning, Oracle Cloud Infrastructure, Hyperion Planning

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.

Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



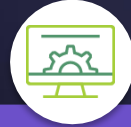
Managed Services

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

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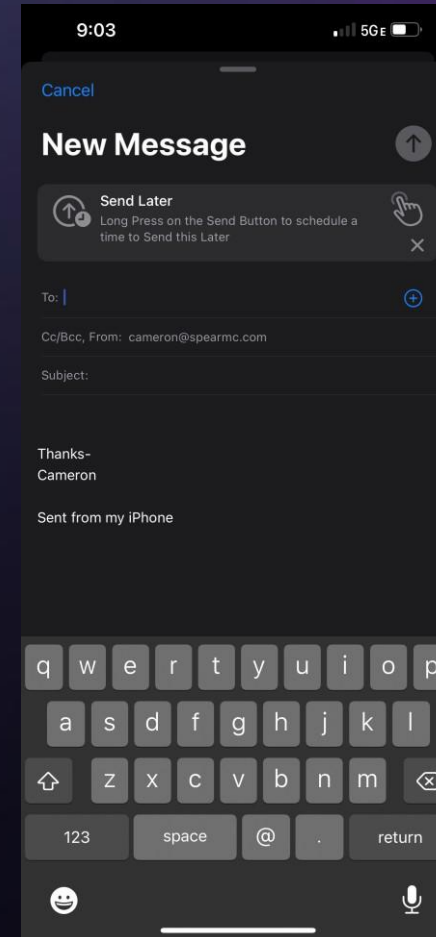


Agenda

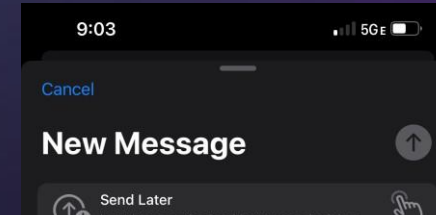
- Introduction
- OGL Demo
- Customer Overviews

Poll the Audience

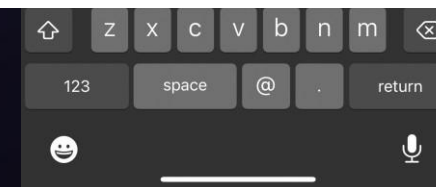
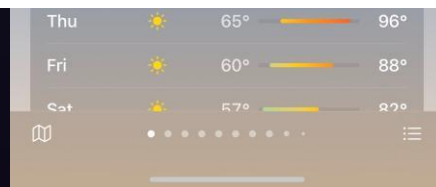
What is a Digital Adoption Platform



What is a Digital Adoption Platform



A digital adoption platform (DAP) is no-code software that integrates completely with applications in order to help the user learn the application. Digital adoption platforms use in-app guidance such as walkthroughs, task lists, smart tips, self-help menus, and more to guide the user through every aspect of an application. This empowers organizations to find true ROI of their internally-used software applications and digital transformation, onboard users and customers to their custom apps, understand how employees and users are adopting and engaging with applications, and create a more intuitive technology experience for their employees, customers, and users.

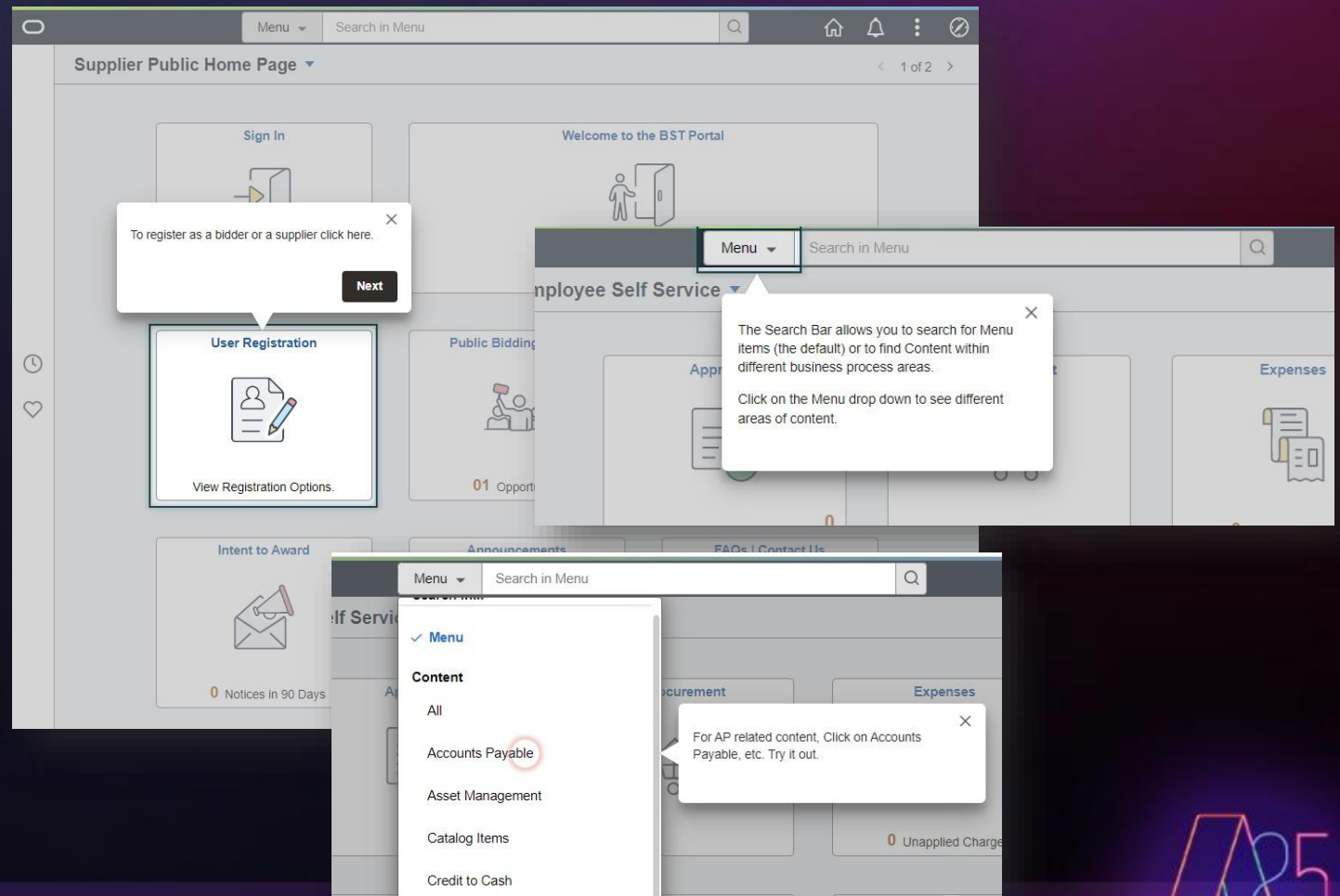


What is Oracle Guided Learning (OGL)

In-application guidance to accelerate your Oracle enablement

Oracle Guided Learning delivers immediate value throughout the entire life cycle and provides benefits that enable you to focus on your priorities

- Immediate **productivity** from day one
- Reduces adoption costs over software term
- Easily configured and **personalized**
- Easily maintained and updated
- Learning and guidance **in the flow of work**, converging learning and business process docs
- **Deployment flexibility**: with managed service and/or self-service options
- Initially developed to support Oracle SaaS Applications. Now supports PeopleSoft.



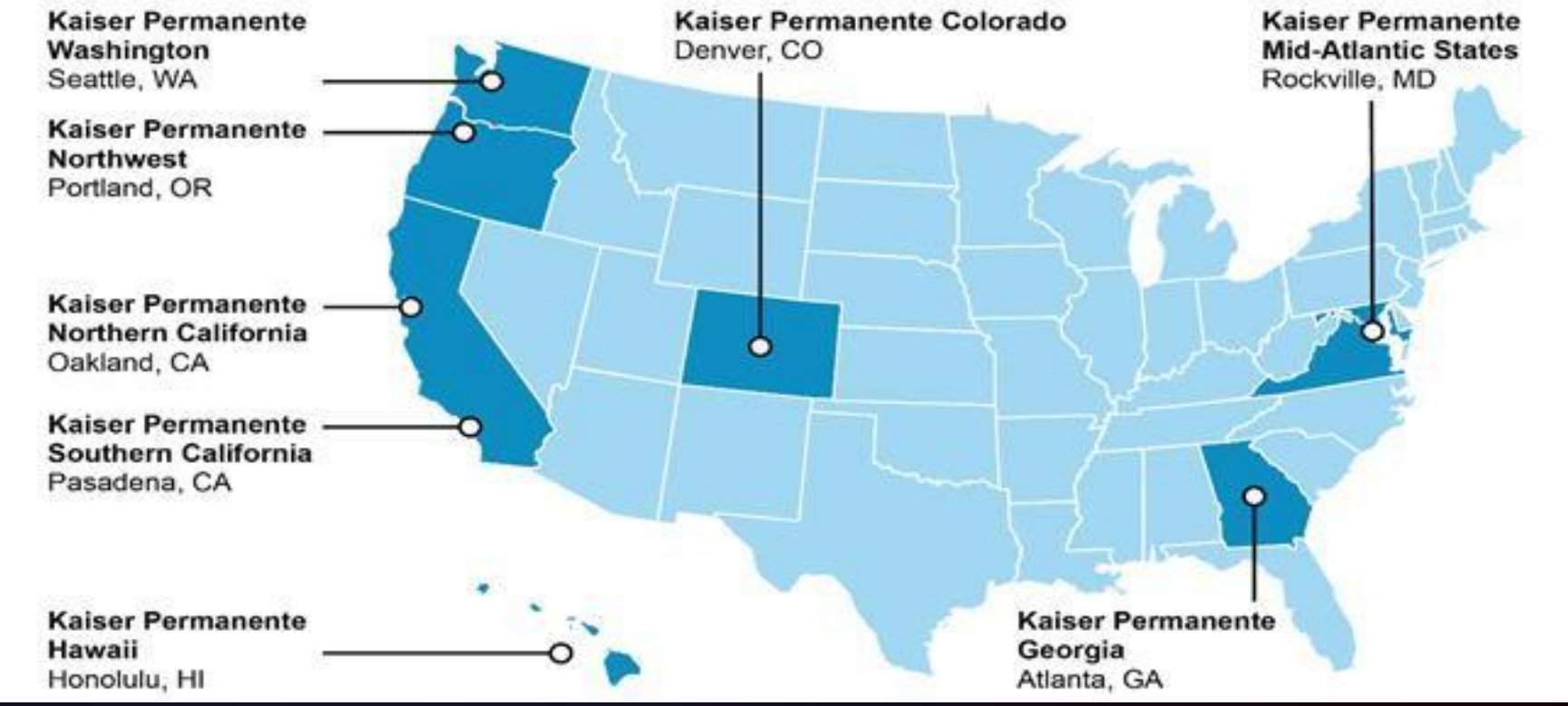
Simulation/Demo

Customer Stories

OGL at Kaiser Permanente

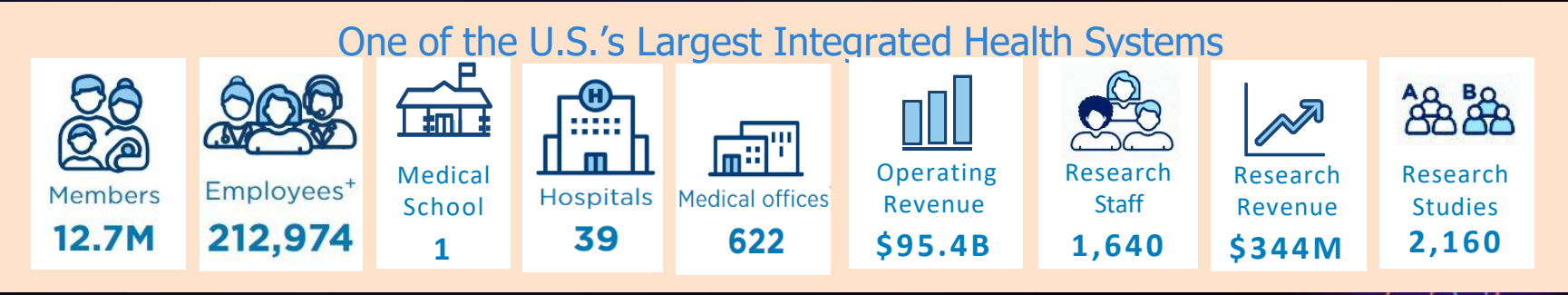


Peoplesoft FSCM = OneLink			
Procure to Pay (Buy 2 Pay)		Record to Report	
eProcurement Purchasing Inventory & Cost Mgt eSupplier Portal Services Procurement Accounts Payable eSettlements Travel and Expenses Sourcing Supplier Contract Mgt		Treasury General Ledger Grants Accounts Receivable Billing Contracts Time Reporting	
Fin. Data Warehouse (FDW)		Acquire to Retire	
Reporting / Analytics Cognos		Asset Management Lease Management Project Costing Commitment Control	



PeopleSoft FSCM 9.2
with a Finance Data Warehouse (FDW) and “Edge” apps
PeopleTools 8.58.17,
Image 43, Oracle 19c Database

248,000 Users
900,000 Jobs Processed/Month
40,700 Support Tickets/Month



OGL at Kaiser Permanente



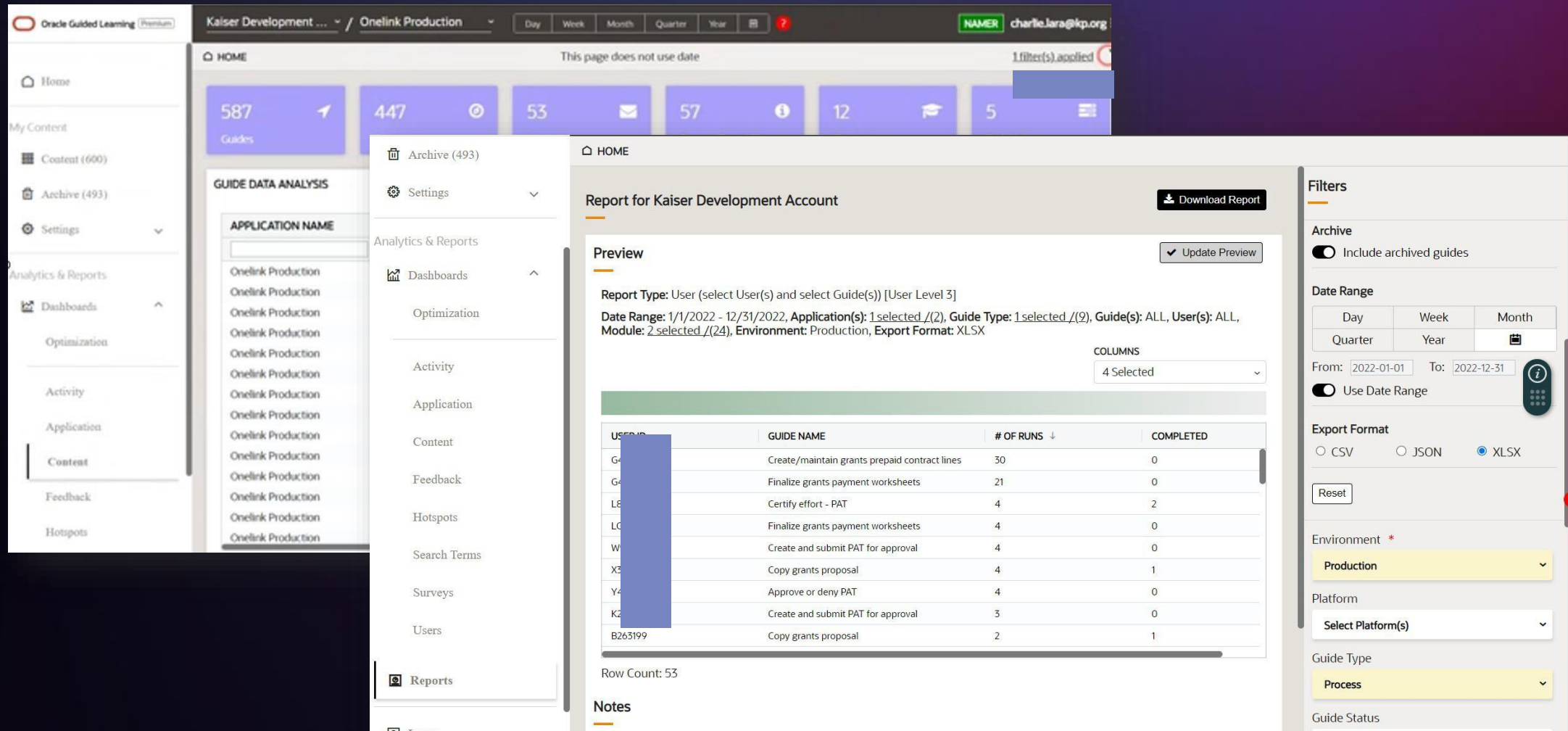
Feature	Description	Usage
Process Guides	Visually walk users through a process, providing step- by-step guidance, to help through a task. For example, guide users through the process of submitting an expense report and enforce correct fields are completed. They can consist of the primary guide and guides that branch off from it.	339
Smart Tips	Provide context-sensitive help, hover text, or supplemental information to form fields, buttons, labels, and other UI elements	56
Message Guides (Splash Tips)	Broadcast message announcing new features and functions, welcome new users and inform them of upcoming events. Message Guides can appear automatically to specific users, and for a given duration. For example, telling users about a new application and provide a video users can watch to learn more	53
Display Groups	Organize and present content in the OGL information icon by using the display group contact by module/process area or any other suitable category	190
Task Lists	Group process guides together into clear task list informing users in what order they need to complete processes.	5
Miscellaneous	Supports the creation of product tours, rich media guides, beacons, invisible Smart Tips and links to additional content	✓
Analytics	Allows clients to filter and report on OGL metric information. For example, to report on usage of the OGL content and other linked content	✓
Launchers	Automatically launch OGL items based on where the users is in the application and what screen element they interact with. For example, launch a process guide or message whenever a user creates a requisition. This informs the user of policy changes or compliance actions	13

OGL at Kaiser Permanente

How do we Measure Success?

- **Monthly tracking and trending of:**
 - Guides used
 - Guides viewed
 - Unique Users (Employee and Supplier)
 - Top Trending Guides (Employee and Supplier)
 - Unique Flash Tips and Smart Tips viewed
 - Support and Training Links selected
 - Task List Usage

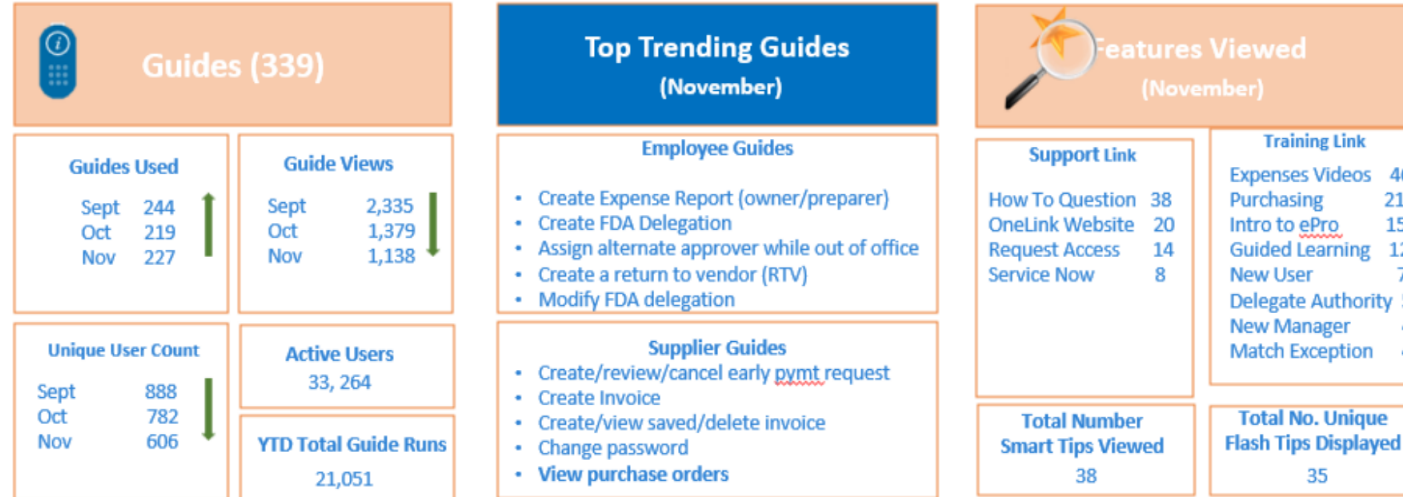
OGL at Kaiser Permanente



The screenshot displays the Oracle Guided Learning (OGL) interface. The top navigation bar shows the user is logged in as 'HAMEL charlie.lara@kp.org'. The main dashboard features a 'HOME' section with a message 'This page does not use date' and a row of six purple cards with numbers: 587, 447, 53, 57, 12, and 5. Below this is a 'GUIDE DATA ANALYSIS' section with a table of 'APPLICATION NAME' entries, all listed as 'Onelink Production'. A sidebar menu on the left includes 'Home', 'My Content', 'Content (600)', 'Archive (493)', 'Settings', 'Analytics & Reports', 'Dashboards', 'Optimization', 'Activity', 'Application', 'Content', 'Feedback', 'Hotspots', 'Search Terms', 'Surveys', 'Users', and 'Reports'. The 'Analytics & Reports' section is expanded, showing a 'Report for Kaiser Development Account'. The report includes a 'Preview' section with the following details: 'Report Type: User (select User(s) and select Guide(s)) [User Level 3]', 'Date Range: 1/1/2022 - 12/31/2022', 'Application(s): 1 selected / (2)', 'Guide Type: 1 selected / (9)', 'Guide(s): ALL', 'User(s): ALL', 'Module: 2 selected / (24)', 'Environment: Production', and 'Export Format: XLSX'. A table of 'COLUMNS' shows 4 selected columns: 'USER ID', 'GUIDE NAME', '# OF RUNS', and 'COMPLETED'. The table lists 10 rows of data, including guide names like 'Create/maintain grants prepaid contract lines', 'Finalize grants payment worksheets', and 'Certify effort - PAT'. The 'Row Count' is 53. The 'Notes' section is empty. On the right, a 'Filters' sidebar includes options for 'Archive' (Include archived guides), 'Date Range' (From: 2022-01-01, To: 2022-12-31), 'Export Format' (CSV, JSON, XLSX), 'Environment' (Production), 'Platform' (Select Platform(s)), 'Guide Type' (Process), and 'Guide Status'.

USER ID	GUIDE NAME	# OF RUNS	COMPLETED
G4	Create/maintain grants prepaid contract lines	30	0
G4	Finalize grants payment worksheets	21	0
LE	Certify effort - PAT	4	2
LC	Finalize grants payment worksheets	4	0
W	Create and submit PAT for approval	4	0
X3	Copy grants proposal	4	1
Y4	Approve or deny PAT	4	0
K2	Create and submit PAT for approval	3	0
B263199	Copy grants proposal	2	1

OGI at Kaiser Permanente



Guides: Available guides in production (includes branches)

Guides Used: Users completed all the steps within a guide from start to finish

Guide Views: Users started a guide but did not complete all the steps

Unique User Count: Grand total of each unique user count per guide who started a guide

Active Users: Year to Date totals of unique users who accessed guides and viewed features

Total Guide Runs: Year to Date totals of Guides runs (excluding Flash and Smart Tips)

Top Trending: Most frequently used guides for the time period

Employee Guides: Guides only available to Kaiser employees and contractors

Supplier Guides: Guides specifically available and tailored to KP suppliers who have access to the eSettlements module

Features Viewed: Totals for each feature (Display Group links, Smart Tips, Flash Tips) for the given time period

Top 10 Public University in US

Total Enrollment - ~45,000

Staff - ~25,000

PeopleSoft Pillars

- **Campus Solutions, HCM, FSCM**

Other Products Evaluated, Approach to Selection

Decision Points

- **Oracle on Oracle**
- **Pre-Built Content**
- **Multi-Application**
- **Accessibility**

Key Project

- **Expenses Rollout**

State of North Dakota

13,000 Employees, 63 Agencies

PeopleSoft Versions

Tools 8.59.22

HCM 9.2.46

FIN 9.2.48

ELM 9.2.22

Portal 9.2.05

Key Implementations

Fluid

Onboarding

Guided Self Service

Annual Acknowledgements

Remote Worker

Kibana – Insights

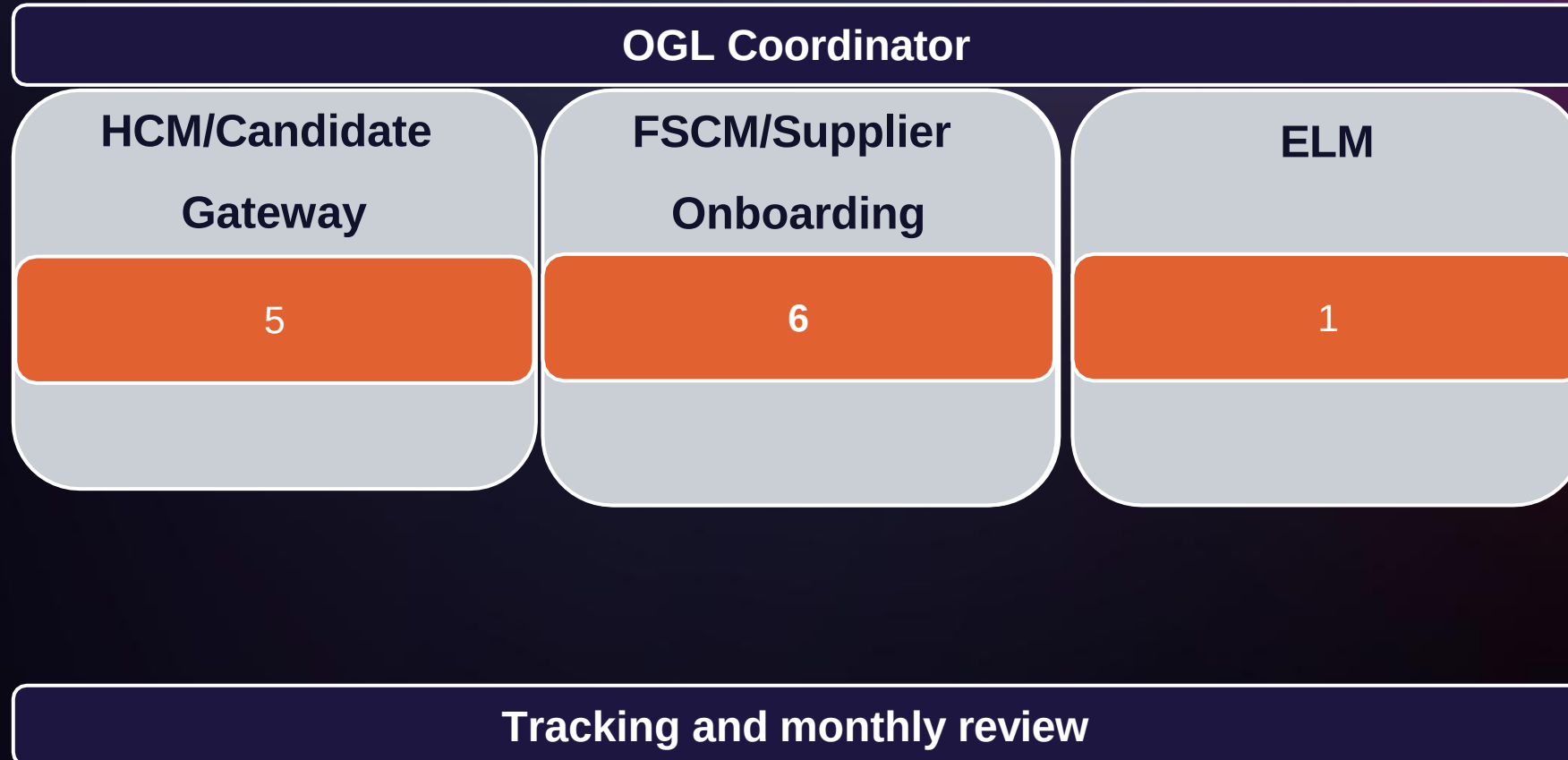
OGL



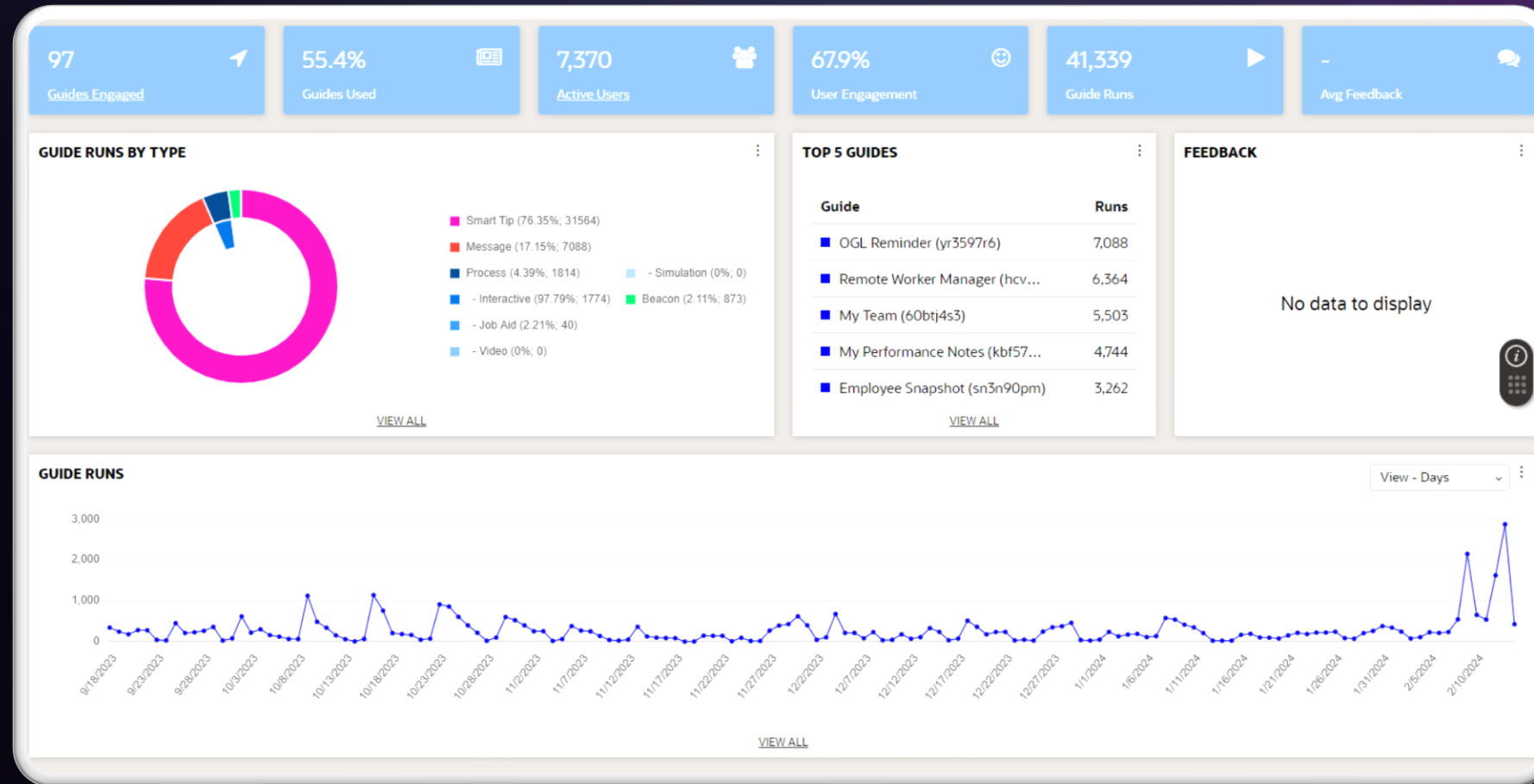
State of ND OGL Implementation

- **Looked at OGL as a replacement for UPK**
 - Needed OGL in all pillars (Portal, HCM, FSCM, ELM)
- **Worked with SpearMC to create guides**
 - Starter Kit
 - Additional Guides
- **Soft OGL Implementation in April 2023 with PT upgrade**
 - Beacons, Messages and Smart Tips (no Process guides)
- **Role Base access of Guides was key**
- **Published OGL guides in September, updates and additional guides in October**
- **Develop cadence of publishing OGL guides monthly**

OGL Editors/Developers



State of ND OGL Activity



Hennepin County

*Event Date

*Expense Type

Expense Details

254 characters remaining



Reference

?

Collapse All

Add: | My Wallet (0)

*Event Date

*Expense Type

Description

254 characters remain

Only actual costs incurred may be claimed, and they may not exceed the federal per diem. See the [conferences and travel policy](#) for more details.

City and County of San Francisco

- **FSCM Rollout**
- **HCM on Roadmap**

[< Records](#)

Scheduled Query

Scheduled Query

Find an Existing Value

Add a New Value

*Query Name

TEST_0213

*Run Control ID

test



Hi! This is your admins - this button isn't working right now.

Click [HERE](#) to launch a guide on how to work around this issue for now.

Find an Existing Value

|

[Add a New Value](#)

CITY OF SEATTLE

- First implemented PeopleSoft Financials 6.1 in 1999
- Re-implemented 9.2 in 2018
- Upgraded to PUM 39 in 2021
- Upgraded to Tools 8.59 and Fluid in 2023
- Approx. 2000 users



Oracle Go To Market Partner OGL for PeopleSoft

SpearMC Value Added Licensing Includes

- Installation
- Example Guides
- Best Practice Design Standards
- Training Workshop
- OGL for PeopleSoft Special Interest Group with Quarterly Trainings
- Annual Assessment/Optimization

Ongoing Managed Service

- Access to OGL for PeopleSoft Starter Kit (pre-built process guides)
- Custom Content Delivery and Maintenance
- Upgrade and PUM Companion

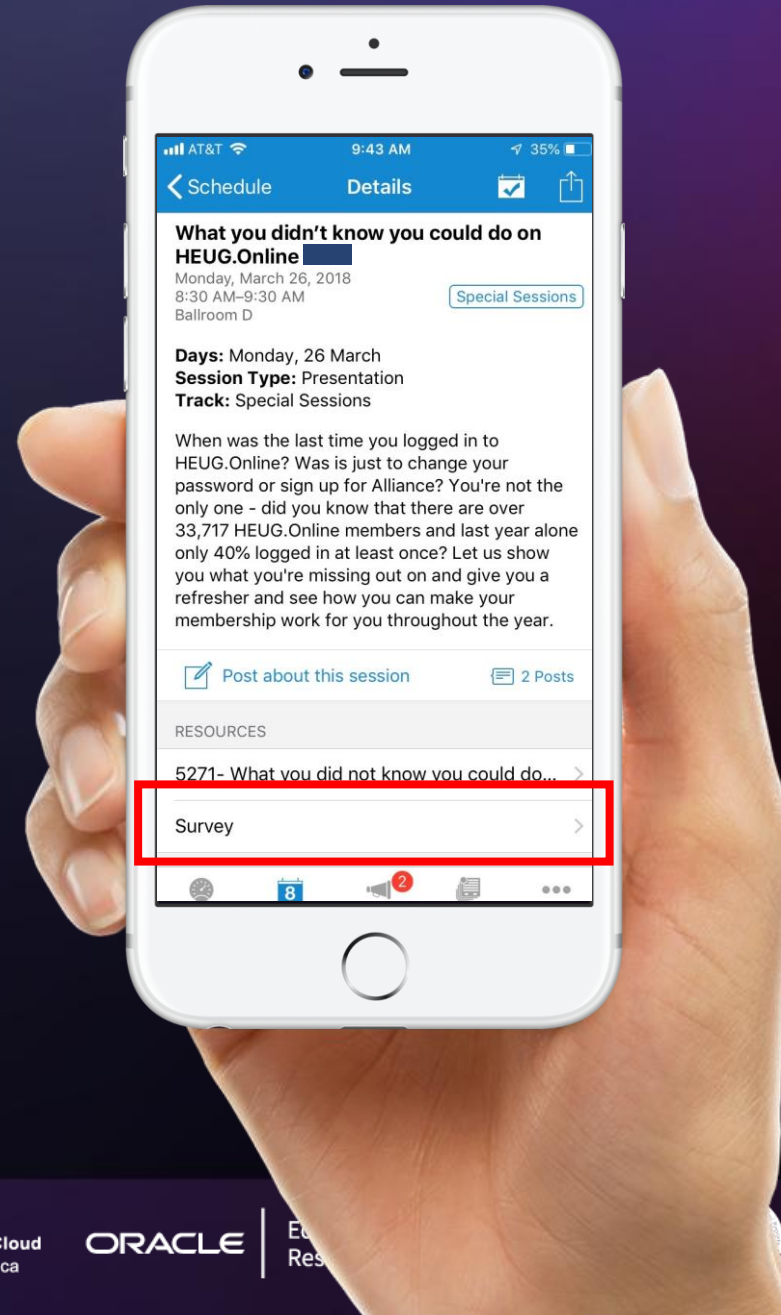
Scan the QR code
to learn more

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!

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About OGL

What is Oracle Guided Learning (OGL)

1 Real Time

Real time guides that show users how to enter transactions that may be complex or rarely used in the system

2 Faster time to productivity

Allows for training as you go. Learn how to do things at the time rather than learning the just in case situations

3 Analytics

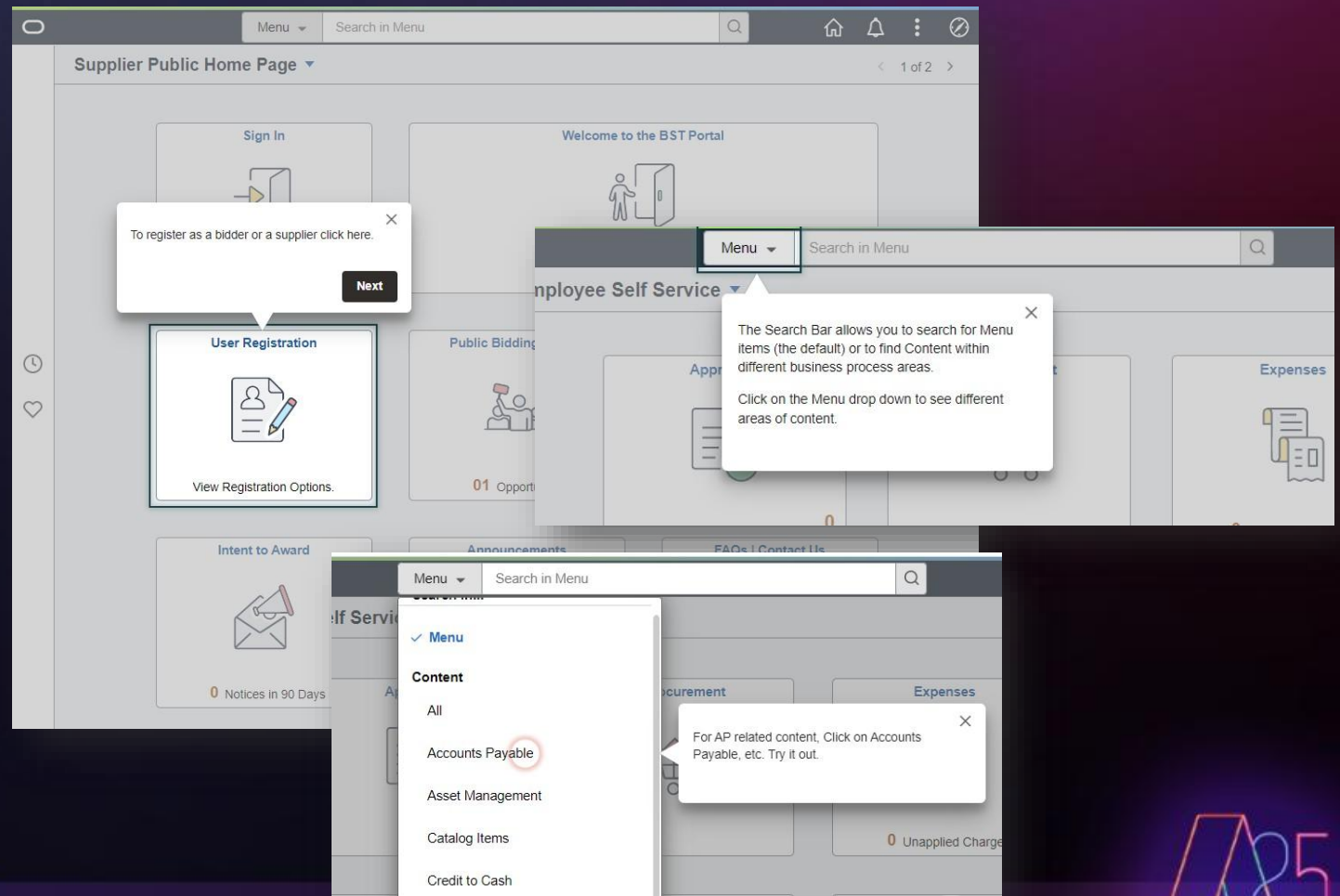
Find out what guides are being used and what transactions users are needing guides to get through

What is Oracle Guided Learning (OGL)

In-application guidance to accelerate your Oracle enablement

Oracle Guided Learning delivers immediate value throughout the entire life cycle and provides benefits that enable you to focus on your priorities

- Immediate **productivity** from day one
- Reduces adoption costs over software term
- Easily configured and **personalized**
- Easily maintained and updated
- Learning and guidance **in the flow of work**, converging learning and business process docs
- **Deployment flexibility**: with managed service and/or self-service options
- Initially developed to support Oracle SaaS Applications. Now supports PeopleSoft.



What is Oracle Guided Learning (OGL)



Accelerate time-to-competency during implementation, onboarding, and role changes



Users enabled through just-in-time, context-sensitive learning that is personalized for each role and your organization



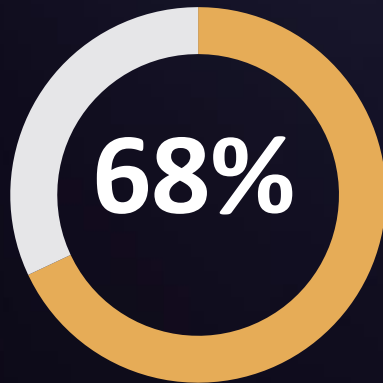
Fewer support calls and lower costs - analytics to consistently optimize usage/adoption



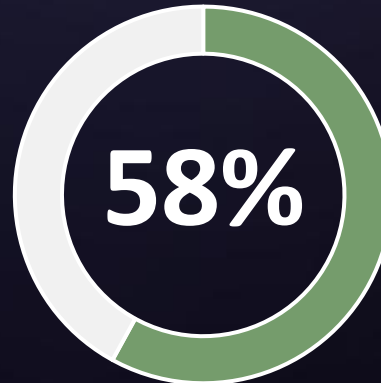
Ensure compliance by maintaining guided material to only display the most current processes/procedures



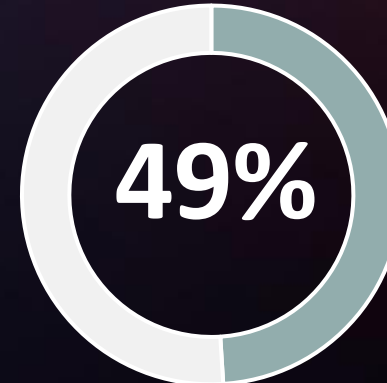
Manage Change Communications around upgrades, process, and policy changes



of employees prefer to learn at work



of employees prefer to learn at their own pace

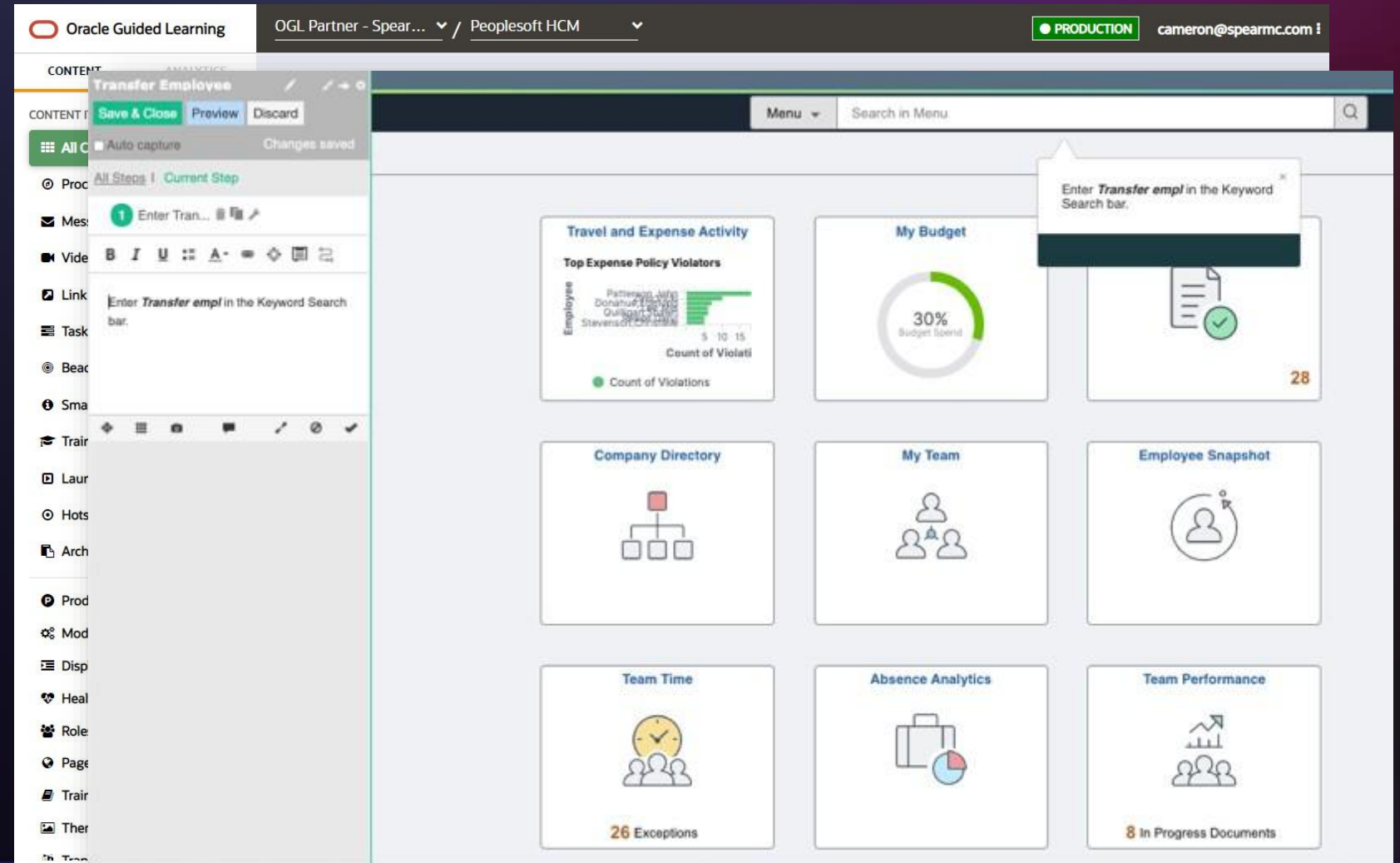


of employees prefer to learn at the point of need

What is Oracle Guided Learning (OGL)

The Oracle Guided Learning application includes a Content Editor and Analytics.

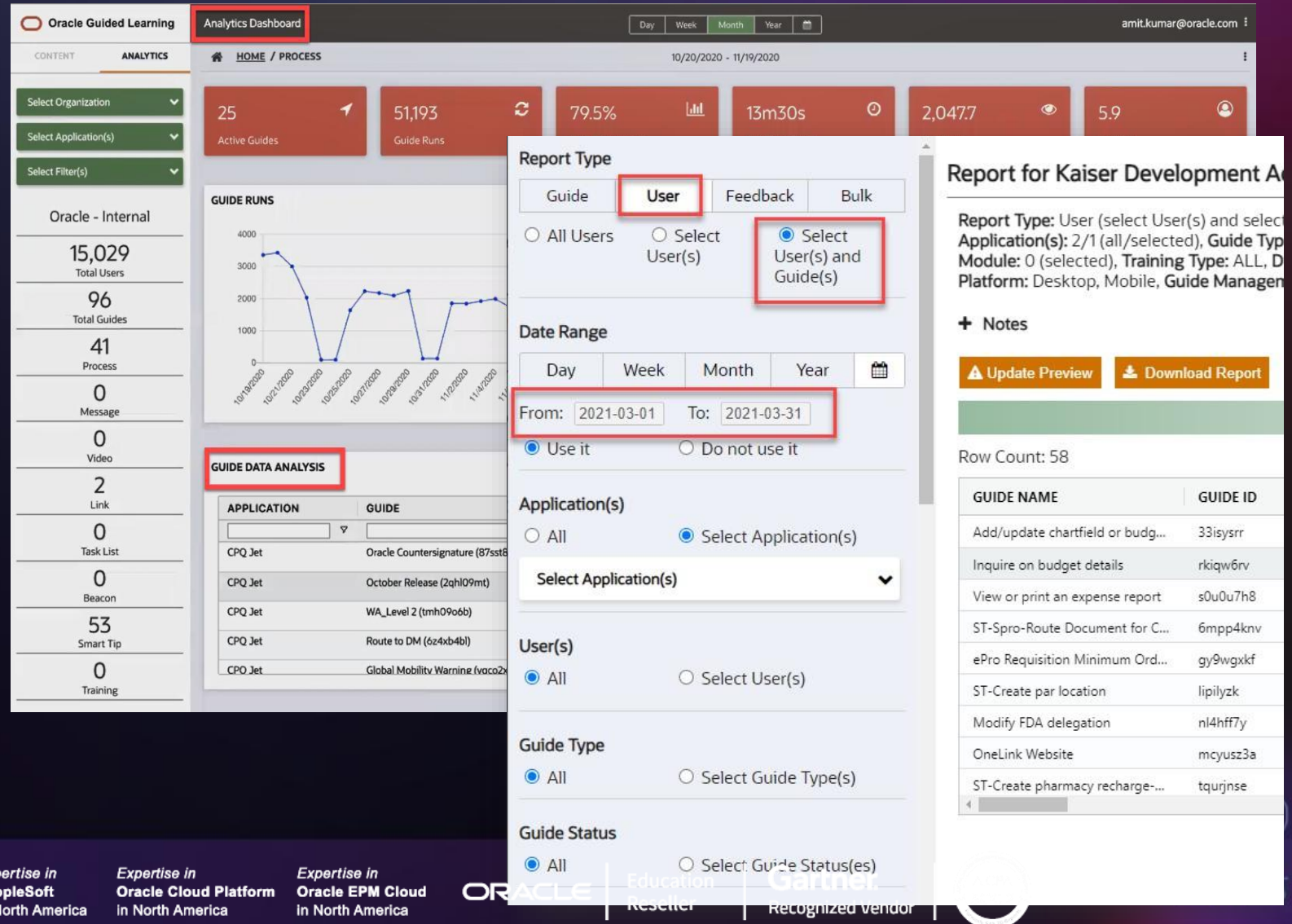
- Each Content Item is shown as Tile (e.g. One tile = One Guide in PeopleSoft)
- Content is linked to a PeopleSoft environment. One OGL application can manage all PeopleSoft environments.
- Content is Published from a development environment into a “production” environment (could be a Non-Prod Training Environment).
- Steps are captured with a number of options embedded



What is Oracle Guided Learning (OGL)

The Oracle Guided Learning application includes a Content Editor and Analytics.

- Dashboards provide real time Analytics into the use of the OGL guides
- Can be narrowed based on specific guide(s), Date Range, or User
- Provides PeopleSoft Administrators ability to link support tickets to training guides (lacking or insufficient)



The screenshot displays the Oracle Guided Learning interface, specifically the Analytics Dashboard and a Report configuration window.

Analytics Dashboard:

- Header:** Oracle Guided Learning, Analytics Dashboard, Date Range: 10/20/2020 - 11/19/2020, User: amit.kumar@oracle.com.
- Navigation:** CONTENT, ANALYTICS, HOME / PROCESS.
- Summary Cards:** 25 Active Guides, 51,193 Guide Runs, 79.5%, 13m30s, 2,047.7, 5.9.
- GUIDE RUNS:** A line chart showing guide runs over time.
- GUIDE DATA ANALYSIS:** A table listing applications and guides.

APPLICATION	GUIDE
CPQ Jet	Oracle Countersignature (87sst6)
CPQ Jet	October Release (2qhl09mt)
CPQ Jet	WA_Level 2 (tmh09o6b)
CPQ Jet	Route to DM (6z4xb4bl)
CPO Jet	Global Mobility Warning (voco2k)
- Left Sidebar (Oracle - Internal):**
 - 15,029 Total Users
 - 96 Total Guides
 - 41 Process
 - 0 Message
 - 0 Video
 - 2 Link
 - 0 Task List
 - 0 Beacon
 - 53 Smart Tip
 - 0 Training

Report Configuration Window:

- Report Type:** Guide, **User** (selected), Feedback, Bulk.
 - ☐ All Users
 - ☐ Select User(s)
 - ☒ Select User(s) and Guide(s)
- Date Range:** Day, Week, Month, Year.
 - From: 2021-03-01 To: 2021-03-31
 - ☒ Use it ☐ Do not use it
- Application(s):**
 - ☐ All ☒ Select Application(s)
 - Select Application(s) dropdown
- User(s):**
 - ☒ All ☐ Select User(s)
- Guide Type:**
 - ☒ All ☐ Select Guide Type(s)
- Guide Status:**
 - ☒ All ☐ Select Guide Status(es)

Report for Kaiser Development A

Report Type: User (select User(s) and select Application(s): 2/1 (all/selected), Guide Type: 0 (selected), Training Type: ALL, D Platform: Desktop, Mobile, Guide Manager

+ Notes

Update Preview Download Report

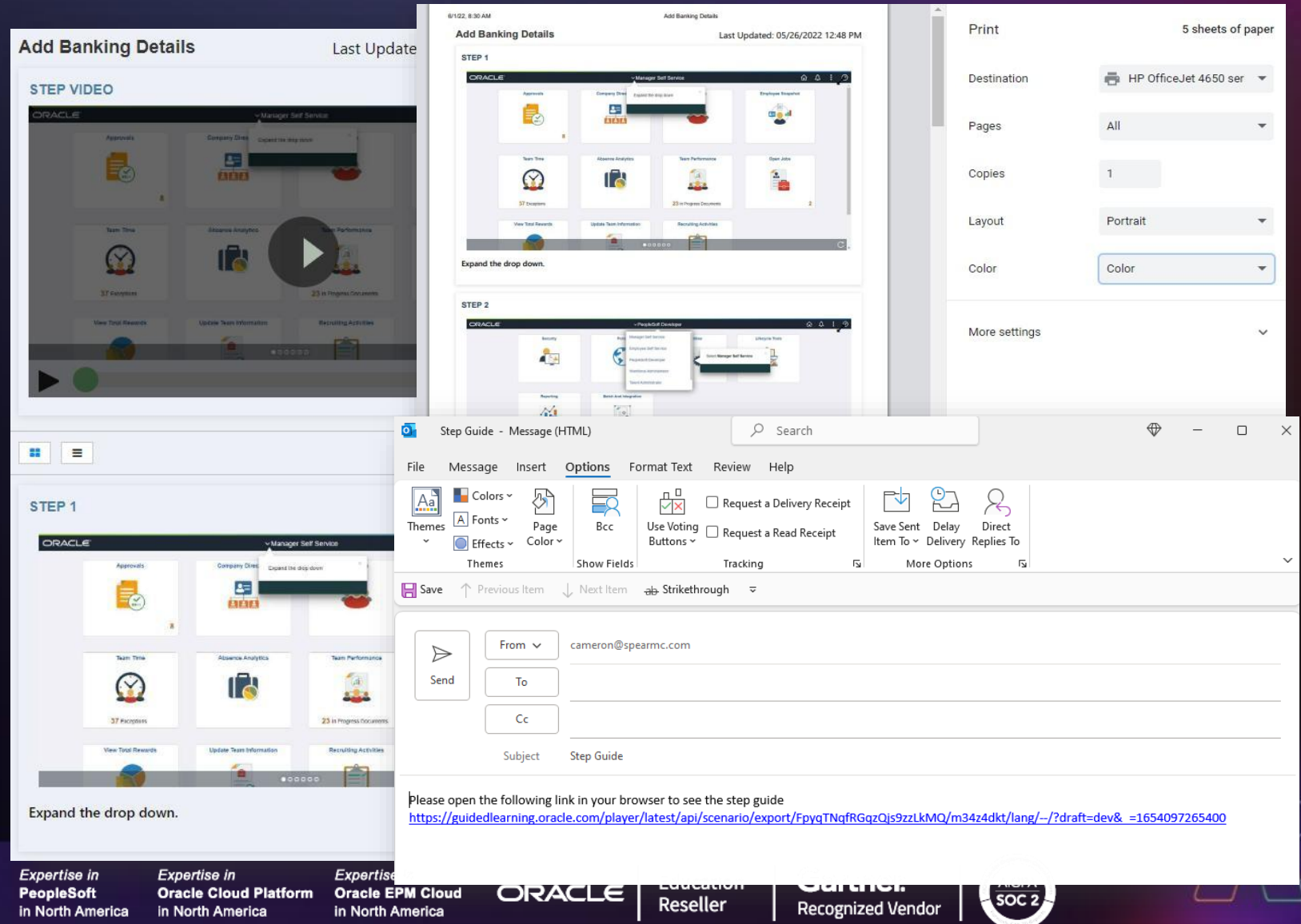
Row Count: 58

GUIDE NAME	GUIDE ID
Add/update chartfield or budg...	33isysrr
Inquire on budget details	rkiqw6rv
View or print an expense report	s0u0u7h8
ST-Spro-Route Document for C...	6mpp4knv
ePro Requisition Minimum Ord...	gy9wgxkf
ST-Create par location	lipilyzk
Modify FDA delegation	n14hff7y
OneLink Website	mcyusz3a
ST-Create pharmacy recharge-...	tquijnse

What is Oracle Guided Learning (OGL)

Step Guides

- A Step-by-Step guide that walks a user through a process. Built in by default
- Replicates “See It!”
- Replicates “Print It!”
- Adds “Email It” – Can be used by Support Personnel to send a guide to a user.
- URL’s can be captured and presented on an internal site



The screenshot displays the Oracle Guided Learning (OGL) interface. It features a video player for a "STEP VIDEO" and a "STEP 1" guide. The guide shows a screenshot of the Oracle Manager Self Service interface with a red circle highlighting a specific area. Below the video and guide, there is a "Print" section with options for destination, pages, copies, layout, and color. To the right, there is a "More settings" dropdown. At the bottom, there is a "Send" button and a "Subject" field. The email interface also includes a "From" field with the address "cameron@spearmc.com" and a "To" field. The subject line is "Step Guide". Below the email fields, there is a link to open the guide in a browser: https://guidedlearning.oracle.com/player/latest/api/scenario/export/EpyqTNqfRGqzQjs9zzLkMQ/m34z4dkt/lang/-/?draft=dev&_id=1654097265400.