

P-050161

ORACLE GUIDED LEARNING

JUNE 9 – 13, 2025

PeopleSoft
RECONNECT
AT BLUEPRINT4D *LIVE!*

MEET SPEARMC



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



Tracy Okamura

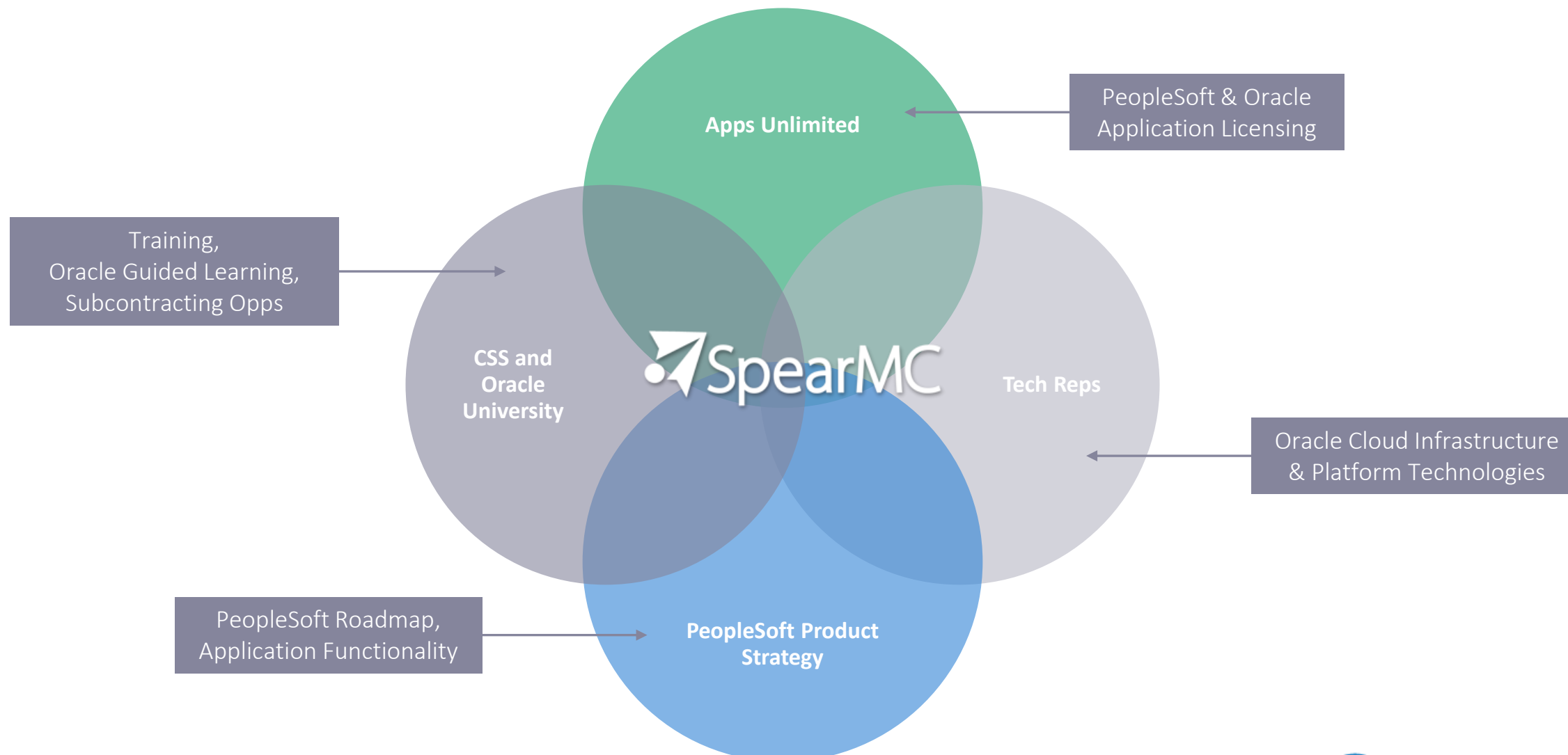
Functional Director
University of California, Berkeley
Financial Information Systems (FIS)

PAM INGRAM, FINANCE IT MANAGER



- Live in the Northwoods of Minnesota in a log cabin
- Love the outdoors, crafting, quilting, playing board games
- 35 years at Hennepin County, MN
- Manage finance functional team

SPEARMC STRATEGY: POSITIONING WITH ORACLE



RECOGNITION AND SPECIALIZATIONS

Oracle Specialized

 **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.

 **Expertise in PeopleSoft in North America**

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

 **Expertise in Oracle EPM Cloud in North America**

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

 **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.

 **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.

 **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

WELCOME TO BLUEPRINT 4D

LEGACY TRAINING

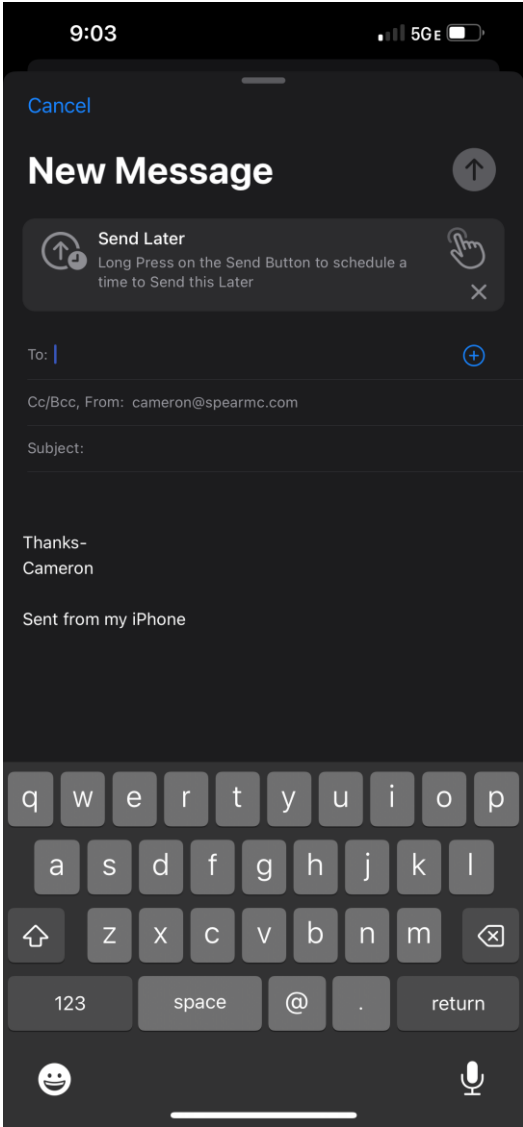
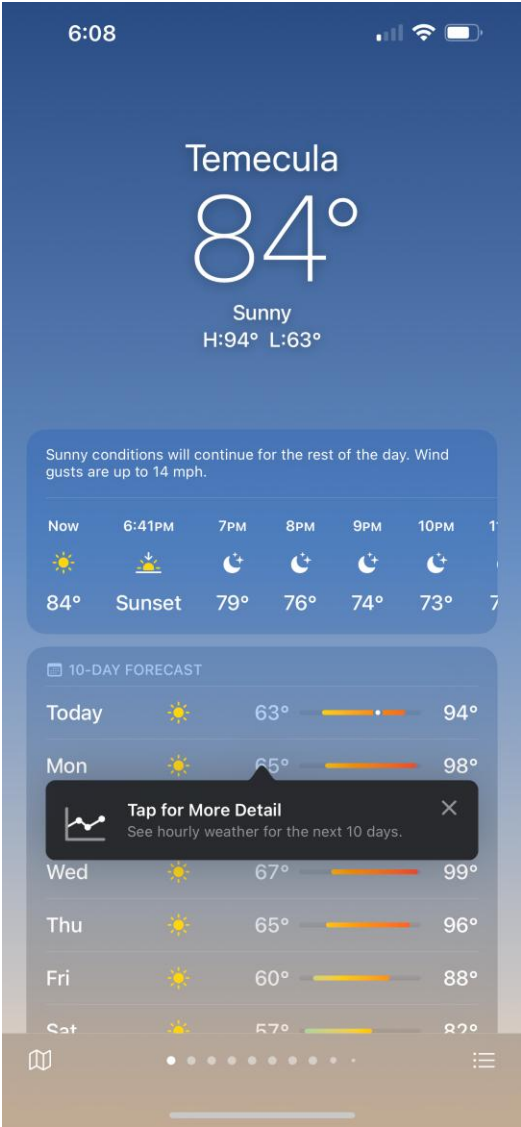
LEGACY TRAINING / LEGACY MINDSET



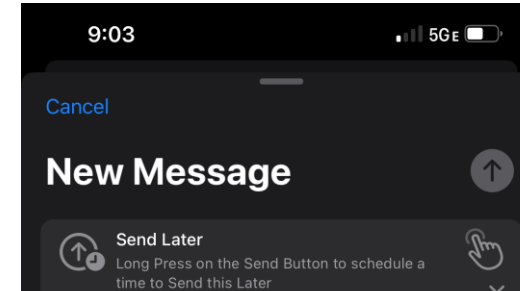
WELCOME TO
BLUEPRINT 4D

DIGITAL ADOPTION PLATFORMS

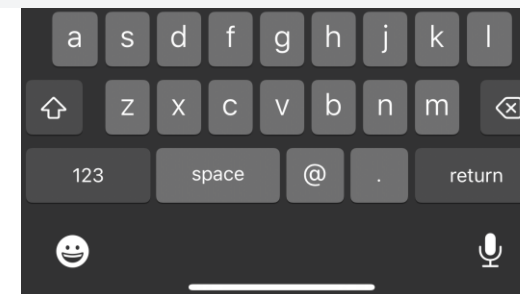
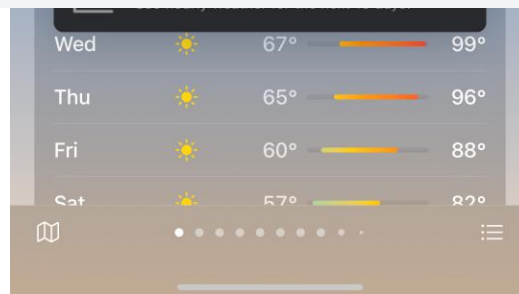
WHAT IS A DIGITAL ADOPTION PLATFORM



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.



WELCOME TO BLUEPRINT 4D

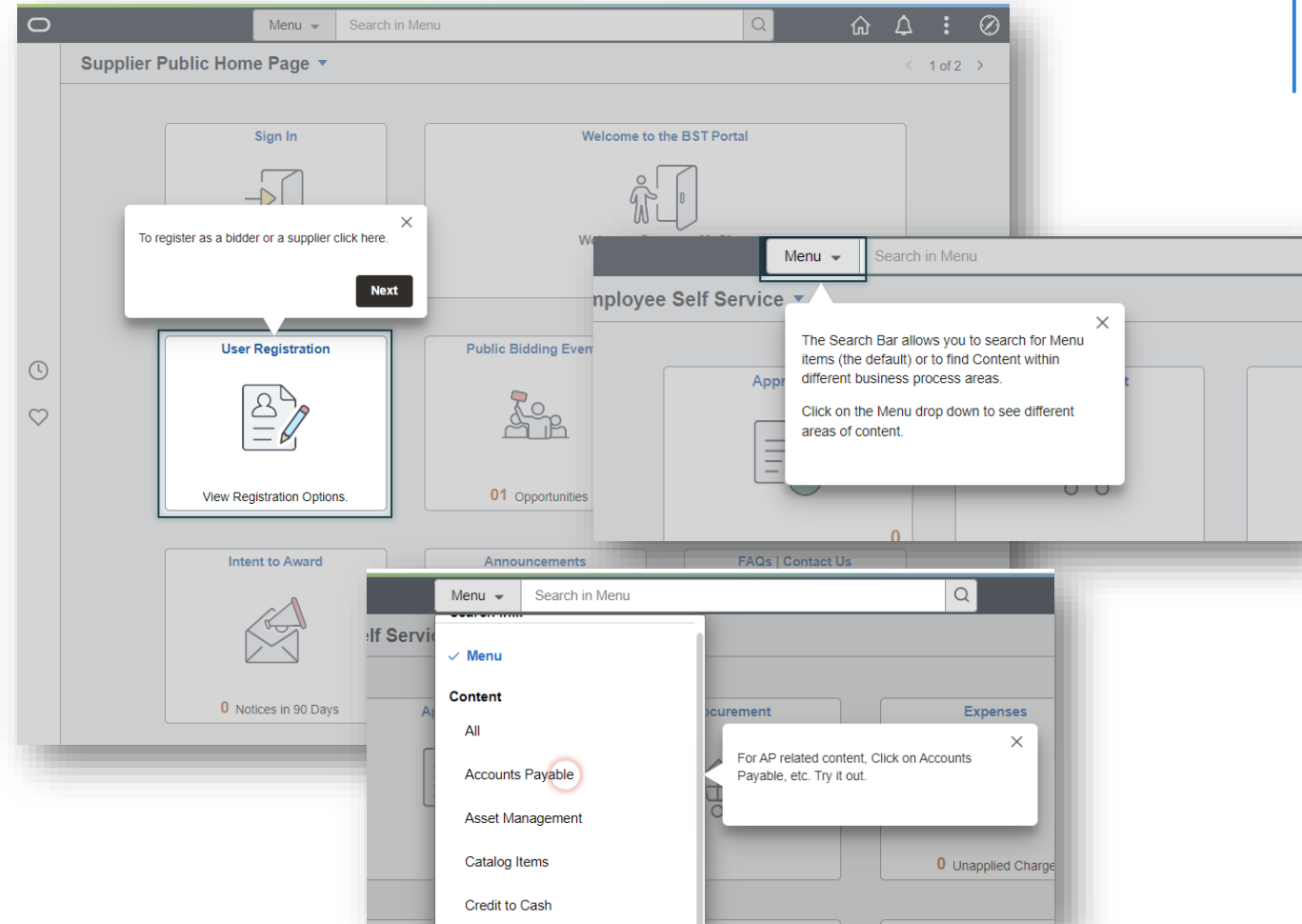
ORACLE GUIDED LEARNING

WHAT IS ORACLE GUIDED LEARNING (OGL)

Real Time Guidance in PeopleSoft

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**
- Integrated **Analytics**
- Learning and guidance **in the flow of work**, converging learning and business process docs
- Pre-Built Content: **SpearMC Starter Kit and Support Services** accelerates implementation
- Initially developed to support Oracle SaaS Applications. Now supports PeopleSoft.



ORACLE GUIDED LEARNING USE CASES

Education



Help your users understand the application

Communicate Change



Announcements, Upgrades, New Features

Policy Enforcement



Require user certifications, block invalid data entry

Personalize Guidance



Customize user learning based on behavior, role, language

Error Proofing



Activate condition-based guidance to avoid errors and validate data

Operational Support



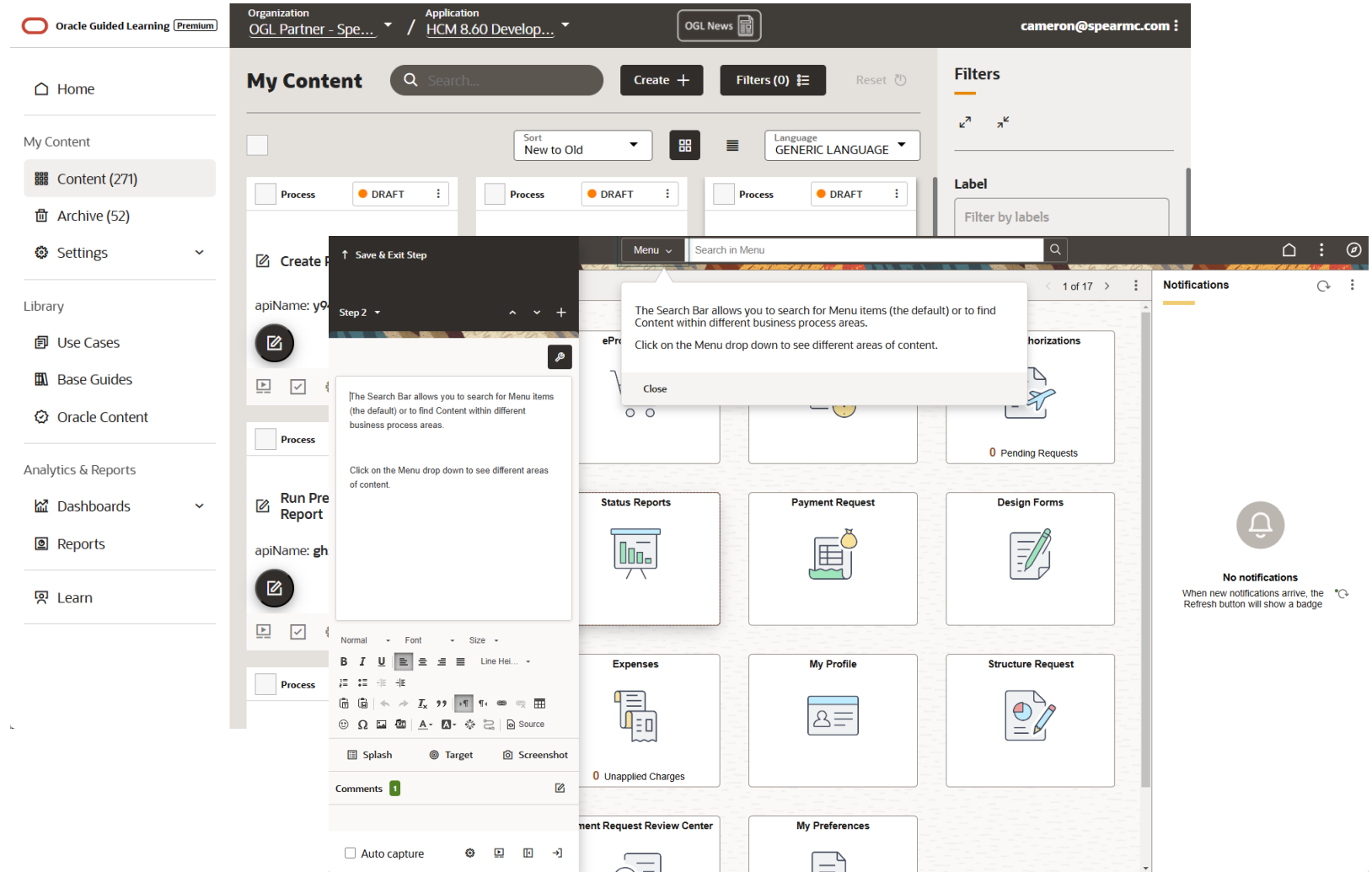
Migrate Help Desk Questions to in app guidance and reduce costs

Measure and Analyze Success – Track user behavior and measure adoption outcomes

WHAT IS ORACLE GUIDED LEARNING (OGL)

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

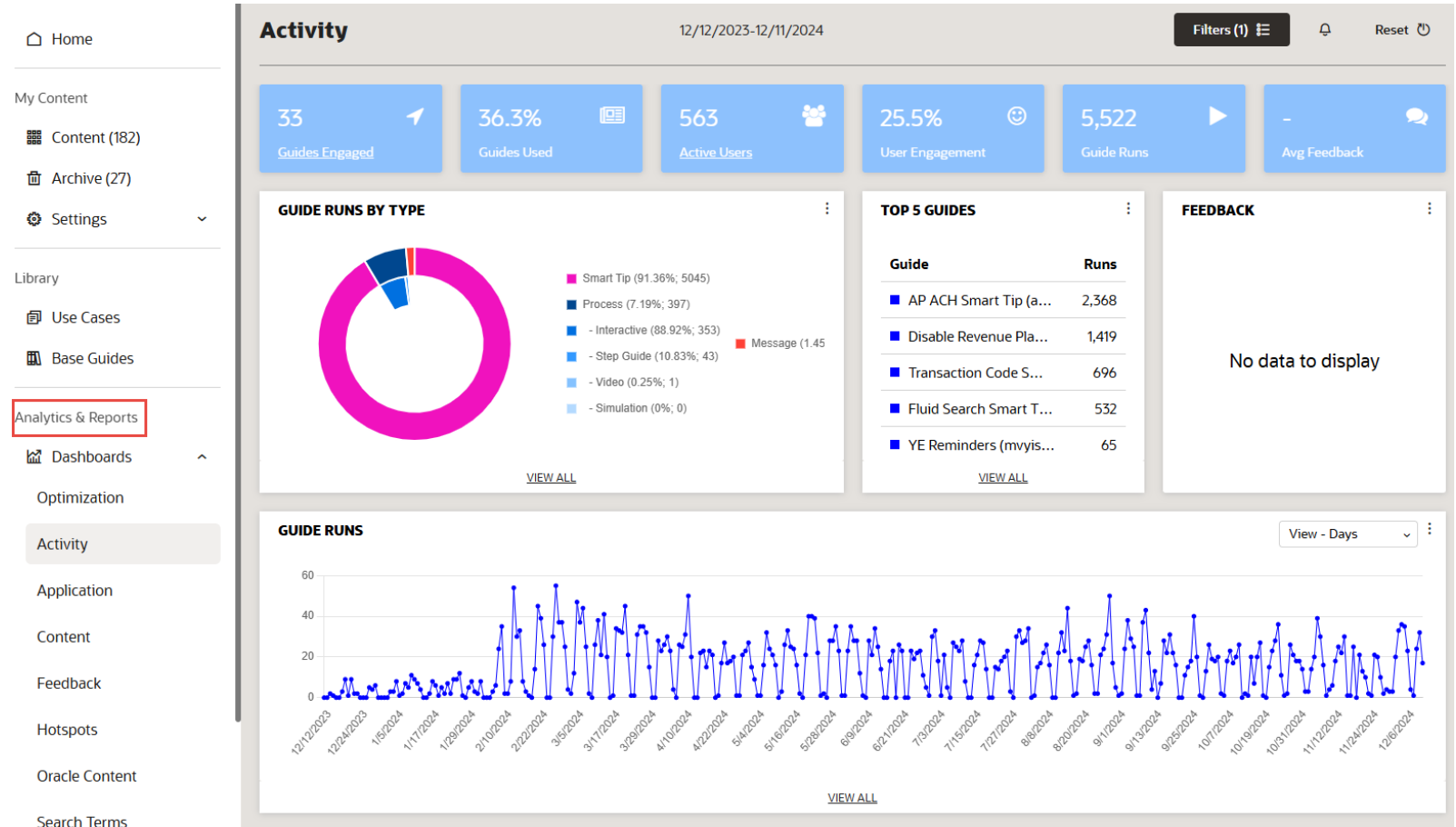
- Each Content Item is shown as Tile (e.g. One tile = One Guide in PeopleSoft)
- Content is linked to a PeopleSoft environment. One OGL application can manage all PeopleSoft environments.
- Content is Published from a development environment into a “production” environment (could be a Non-Prod Training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



WHAT IS ORACLE GUIDED LEARNING (OGL)

Job Aids

- A Step-by-Step guide that walks a user through a process. Built in by default.
- Replicates Legacy Techniques: “See It!”, “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 collage illustrates the Oracle Guided Learning (OGL) interface and its integration with email. The top-left screenshot shows a video player for a 'STEP VIDEO' titled 'Add Banking Details'. The top-right screenshot shows a print preview for the same guide, with settings for destination (HP OfficeJet 4650 ser), pages (All), copies (1), layout (Portrait), and color (Color). The bottom-left screenshot shows the OGL interface for 'STEP 1' of the 'Add Banking Details' process, with a grid of icons for different tasks. The bottom-right screenshot shows an email client window titled 'Step Guide - Message (HTML)' with a subject line 'Step Guide' and a body containing a link to the OGL guide: https://guidedlearning.oracle.com/player/latest/api/scenario/export/FpyqTNqfRGqzQjs9zzLkMQ/m34z4dkt/lang/---/?draft=dev&_id=1654097265400.



WELCOME TO

BLUEPRINT 4D

DEMO



WELCOME TO

BLUEPRINT 4D

PANEL

By the numbers...

#1 Public University

45,882... Total Enrollment

26%... First Generation first-year students

60... Nobel Prizes by alumni/faculty

223... Olympic medals won by students/alumni

104... National championships won by Cal teams

UC Berkeley



PeopleSoft Footprint

PeopleTools 8.61

PeopleSoft FSCM PUM 50

Overview of FIS

UC Berkeley's Digital Adoption Journey

Primary Drivers for the need for DAP at UCB

- Expenses Rollout
- Improve Usability of Enterprise Applications
- Decrease Support Costs

Multiple DAP's were evaluated on the basis of user experience, content editing, accessibility, ongoing maintenance and total cost of ownership.

UGL was selected on the basis of total cost of ownership.

Key Decisions

- Branding
- Design Standards
- Smart Tips vs. Process Guides

Importa
Upco
No plan

Review Expense Report

Audience: Employee.

Next

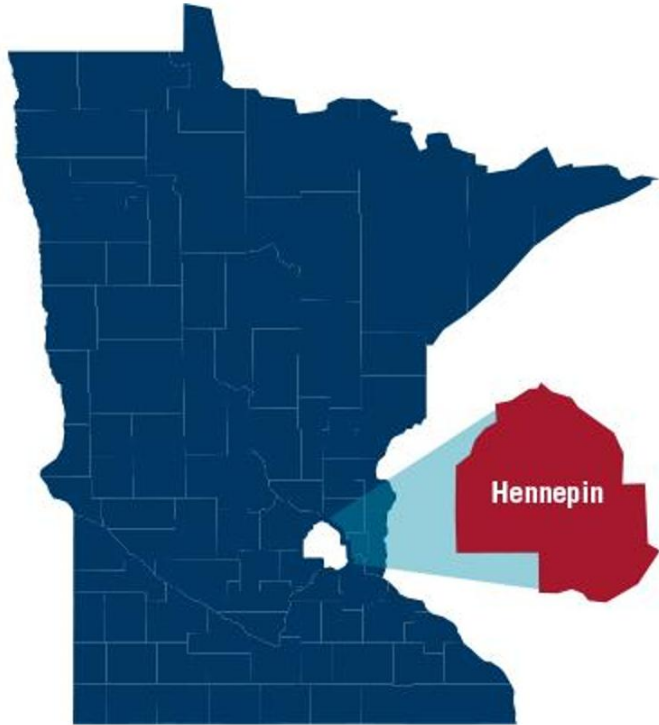
Approvals



You are not authorized for this page.



Hennepin County, MN



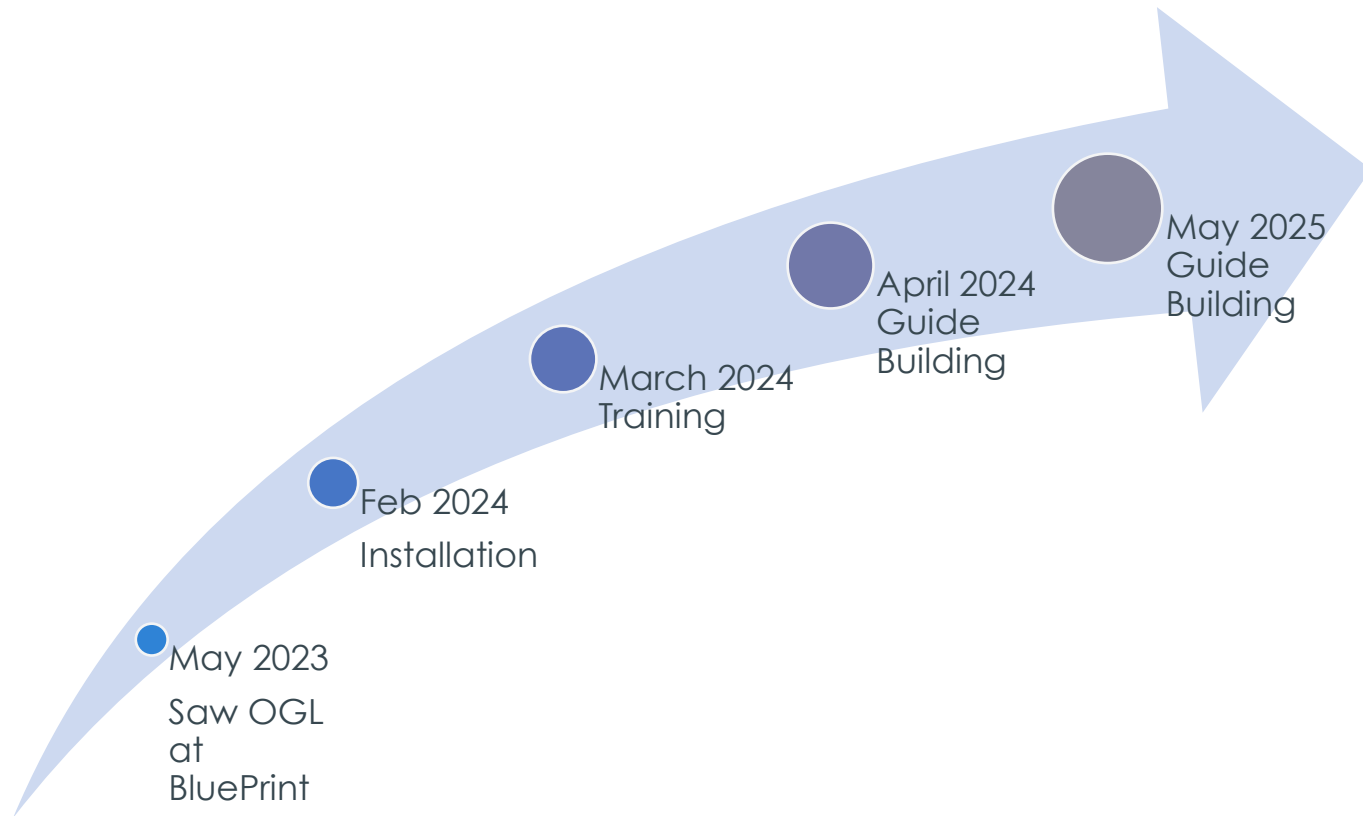
- Hennepin County is the most populated of the 87 counties in the state of Minnesota
- Approximately 1.1 Million residents
- 9,200 employees
- Over \$2 Billion budget
- ***Fun facts:***
- We have one recreational boat for every six people.
- Mall of America can hold 32 Boeing 747 airplanes
- MN harvests 18.9 Million pounds of fish per year



FOOTPRINT

- OCI
- Tools 8.60.19
- FSCM 9.2.50
- HCM 9.2.48
- ELM
- PHIRE change management
- Pathlock security
- Supplier and Customer Portals

Hennepin's Journey



- Process guides built:
- Smart Tips:
- Messages:

Who is going to do the work?

- **Sys Admins** worked with SpearMC to “install” and migrate the code to each environment
- **Analysts** learned how to use OGL and create OGL content
- **Product Owner** the person organizing focus groups, monitoring the request log, ensuring testing is completed
- **BA's** responsible for requesting content be built as well as testing the built content to ensure it can go to production



HOW DO YOU LEARN IT ALL?

- Well, you can't do it overnight!
- Make a plan
- Resources:
 - Other companies using it today, interview them, find out their approach
 - Leverage SpearMC starter kits
 - Read the OGL Technical Brief
 - Training sessions with SpearMC
 - Smaller group
 - Request to record
 - In between sessions, use the product
 - Beware when you google "Oracle guided learning"

LESSONS LEARNED – ADVICE - TIPS

- It's an investment, plan well and reap the benefits
- Allow yourself time
- Understand your architecture and make sure your system administrator is working with your team and SpearMC
- Use a small group to learn the product and have working sessions weekly
- Host focus groups to get feedback from users on how you plan to roll it out

APPENDIX – CLIENT EXAMPLES

Communicate Change (Conditional Activation of SmartTip)

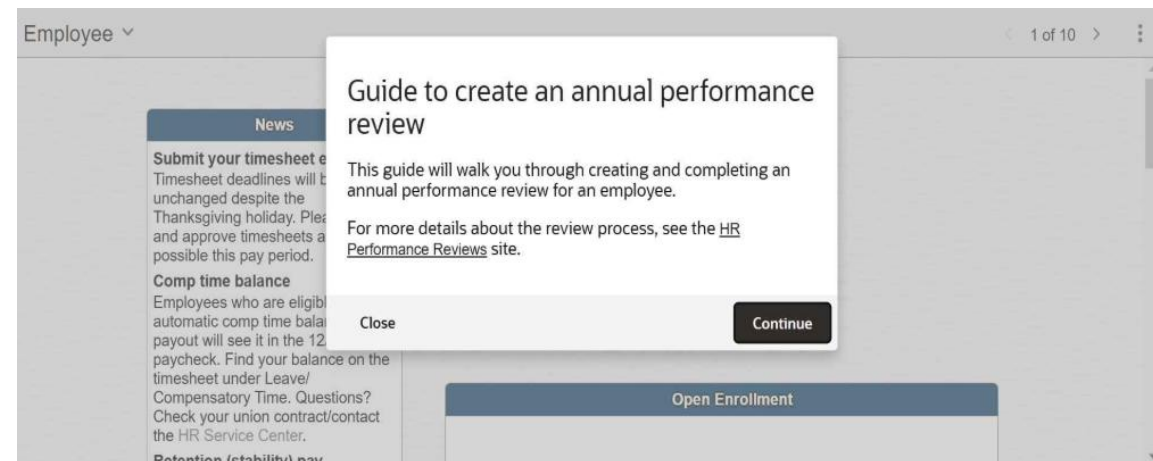
Welcome to the new Fluid PeopleSoft 9.2!

[Click here](#) for a brief video orientation to PeopleSoft Fluid.

Additional details on the Fluid changes and walkthroughs of the new homepages are available on the [FinMAP SharePoint](#).

For step-by-step assistance with PeopleSoft transactions, [click here](#) to learn about Oracle Guided Learning.

Personalized Guidance (Role Based Guide)



APPENDIX – CLIENT EXAMPLES

Policy Enforcement (Conditional Activation of SmartTip)

*Event Date *Expense Type Expense Details

254 characters remaining



Reference

ⓘ | Collapse All Add: | My Wallet (0)

*Event Date *Expense Type Description

Meals, Incidentals Travel 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.

Error Proofing (Avoid Bug)

< 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

WELCOME TO BLUEPRINT 4D

QUESTIONS?

WELCOME TO BLUEPRINT 4D

CAMERON MCCLURG

Vice President

cameron@spearmc.com

LinkedIn: [cameron-mcclurg](#)

(206) 819-7851

THANK YOU

ORACLE GO TO MARKET PARTNER

SpearMC Consulting is the official Value-Added Reseller/Implementer of 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

SpearMC Ongoing Support Service

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

SPEARMC OGL – STARTER KIT

Fast-track build of guides

Pre-built guides that can be used out of the box or modified for customer specific branding, language or custom steps.

- Employee Self Service
- Manager Self Service
- Core Functions (Accounts Payable, Benefits Administration, Admissions)



EXPEDITE THE LAUNCH OF OGL FOR PEOPLESOFT

In addition to training and implementation services, SpearMC offers a Starter Kit to help your team fast-track development of OGL guides for PeopleSoft. The Starter Kit works immediately after importing it to your PeopleSoft environment, and our team provides training on how to update guides.



Why Use SpearMC's OGL Starter Kit?

WORKS OUT OF THE BOX

The Starter Kit immediately works in your environment. Simply turn guides on or off.

WORKS FOR ALL PEOPLESOFT CUSTOMERS

Our guides will work in all PeopleSoft versions and deployment models.

ADAPTABILITY

We provide training on how to modify the guides, add or remove steps, update language, links, and logos. We will help you migrate to Search-Based guides or even to the Classic Menu.

TEMPLATES TO COPY

Quickly copy and modify templates and techniques for Process Guides, Smart Tips, Task Lists, Launchers and more.

STARTER KIT CONTENT

- Employee/Manager Self-Service
- Applicant/Student Self-Service
- Supplier/Customer Self-Service
- Core Functional – FSCM, HCM, Campus
- PeopleTools and Support Desk
- Enterprise Components

[LEARN MORE ABOUT OGL](#) ➔

Email info@spearmc.com
or call 866-SPEARMC for
more information.

SPEARMC OGL – STARTER KIT

Fast-track build of guides

Pre-built guides that can be used out of the box or modified for customer specific branding, language or custom steps.

- Employee Self Service
- Manager Self Service
- Core Functions (Accounts Payable, Benefits Administration, Admissions)

SpearMC		OGI for PeopleSoft Starter Kit - CS
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CS Module	Guide
General	Intro to OGI with Remind Me Later Feature
General	Survey Starter
Campus Community	Entering Athletic Participation
Campus Community	Entering Personal Identification Numbers
Campus Community	Entering an External System ID
Campus Community	Entering Driver's License Data
Campus Community	Entering Citizenship and Passport Data
Campus Community	Entering Respiratory Exam Information
Campus Community	Entering Physical Exam Information
Campus Community	Entering Eye Exam Information
Campus Community	Maintaining Event Data - Viewing Campus M
Campus Community	Maintaining Event Data - Viewing Person Ev
Campus Community	Maintaining Event Data - Viewing Event Sum

SpearMC		OGI for PeopleSoft Starter Kit - F
---------	--	---------------------------------------

FSCM Module	Guide
General	Intro to OGI with Remind Me Later F
General	Survey Starter
AM, AP, & GL	Create Regular PO Voucher
AM, AP, & GL	Create Adjustment Voucher
AM, AP, & GL	Reversal Voucher
AM, AP, & GL	Close Vouchers
AM, AP, & GL	Request a New ChartField Value
AM, AP, & GL	Create Regular PO Voucher - Nav Collection
AM, AP, & GL	Managing Vouchers - Delete Vouchers
AM, AP, & GL	Managing Vouchers - Posting a Voucher
AM, AP, & GL	Managing Vouchers - Approving a Voucher
AM, AP, & GL	Managing Vouchers - Unposting Vouchers
AM, AP, & GL	Managing Vouchers - Marking a Voucher for Closure
AM, AP, & GL	Managing Vouchers - Correcting Vouchers
AM, AP, & GL	Maintaining Suppliers - Adding a Supplier
AM, AP, & GL	Entering Vouchers - Entering Journal Vouchers
AM, AP, & GL	Entering Vouchers - Entering Single Payment Vouchers
AM, AP, & GL	Using Control Groups - Creating Control Groups

SpearMC		OGI for PeopleSoft Starter Kit - HCM
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HCM Module	Guide
General	Intro to OGI with Remind Me Later Feature
General	Survey Starter
Absence Management	Using Schedules - Defining Workdays
Absence Management	Using Schedules - Creating and Viewing Schedules
Absence Management	Using Schedules - Defining Holiday Schedules
Absence Management	Using Schedules - Assigning Work Schedules
Absence Management	Entering Absences - Entering, Updating, and Voiding Absence Events
Absence Management	Entering Absences - Viewing Current Absence Entitlement Balances
Absence Management	Extended Absences - Requesting Extended Absences and Viewing Extended Abs
Absence Management	Setting Up Self-Service Absence Transactions - Viewing Self-Service Absence Rules
Absence Management	Setting Up Self-Service Absence Transactions - Defining Self-Service Absence Ru
Absence Management	Setting Up Self-Service Absence Transactions - Viewing Forecasting Rules for Self
Absence Management	Manager Self-Service Scheduling - Managing Schedules, Overriding Shifts, and Sele
Absence Management	Manager Self-Service Scheduling - Replacing, Copying, and Swapping Schedules
Absence Management	Manager Self-Service Scheduling - Assigning and Creating Schedules
Absence Management	Self-Service Absence Requests - Managing Employee Self-Service Pages
ESS	eBenefits - Benefit Details Tile
ESS	eBenefits - Benefits Summary Page
ESS	eBenefits - Dependent and Beneficiary Information Page
ESS	eBenefits - Life Events Page

OGL – NEXT STEPS

SpearMC's Pathway to OGL

Planning:

- Demo
- Quote
- Perform impact analysis on the modules and transactions with greatest benefit to end users.
- Review existing material available in-house and from SpearMC's PeopleSoft Starter Kit and Training Library.

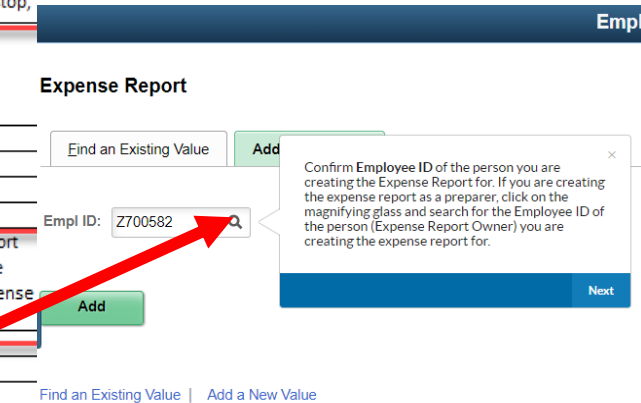
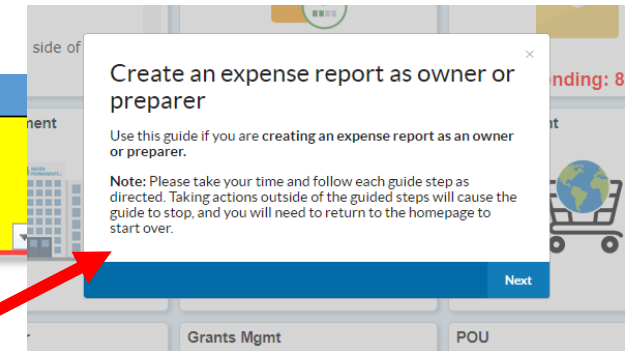
Developing:

- Licensing
- Installation and Training
- Create POC Guide(s)/Assess
- Start with SpearMC Starter Kit with easy Turn On/Turn Off. Designed to work out of the box.

Roll-out and Maintenance:

- Leverage internal Change Management Expertise, Pilot group
- Start small and Expand
- SpearMC's provides flexible options for building and managing OGL content

Create an Expense Report As Owner or Preparer		
STEP #	Step Description Type	Step Description Value
0	Step Description Introduction	Create an expense report as owner or preparer Use this guide if you are creating an expense report as an owner or preparer. Note: Please take your time and follow each guide step as directed. Taking actions outside of the guided steps will cause the guide to stop.
1	Step Description	Click Expenses.
1	Step Note	
1	Step Deep Link	
1	Step Smart Tip	
1	Regional Exception	
2	Step Description	Confirm Employee ID of the person you are creating the Expense Report for. If you are creating the expense report as a preparer, click on the magnifying glass and search for the Employee ID of the person (Expense Report Owner) you are creating the expense report for.
2	Step Note	
2	Step Deep Link	



ADDITIONAL INFO

Oracle Blog Post – [Time to Pay Attention to Oracle Guided Learning](#)

OGL Success Story – [How Kaiser Permanente Pioneered OGL on PeopleSoft](#)

OGL Success Story – [City of Seattle Modernizes Training with OGL for PeopleSoft](#)

OGL ACCESSIBILITY

OGL is designed with accessibility features to support assistive technologies, such as screen readers, as well as keyboard navigation. For more information about Oracle's commitment to accessibility, see <http://oracle.com/accessibility>

Navigation & Keyboard Shortcuts

Users can navigate within OGL, transition between OGL and the host application, and access all relevant functionality using only the keyboard. Assistive technology is not required to use keyboard-only navigation. When a guide is running and a tip appears, the focus will be placed on the tip and then the Tab key may be used to navigate within the tip. Tabbing accesses the OGL Launcher as the last item on a page's Tab order. Using the keyboard shortcut below to open and close the Help Panel is a quicker method to access OGL.

OGL ACCESSIBILITY

Keyboard shortcuts enable user interface actions without a mouse. Following is a list of shortcuts available for OGL and their function:

Keyboard Shortcut	Description
Alt+Ctrl+H	Open and close the Help Panel. The Help Panel will open with focus on the Search bar. The tab button can then be used to navigate within the panel.
Alt+H	Toggle the focus from the tip on screen to the element to which it is associated. The same shortcut is used for toggling focus on the Feedback modal. Please see below for variations for Splash tips with the target element "body": - For splash without overlay: Give focus to the first focusable element in the page - For splash with overlay: Screen reader will read " Unable to switch focus from splash tip with overlay"
Alt+M	This shortcut moves the focus to the first display group on the display group menu.
Esc	If the focus is on the Help Panel, the Esc button will close the Help Panel and return focus to the host application. If the focus is on a tip, the Esc button will close the tip AND close the guide.

RATE THIS SESSION!

SESSION TITLE:

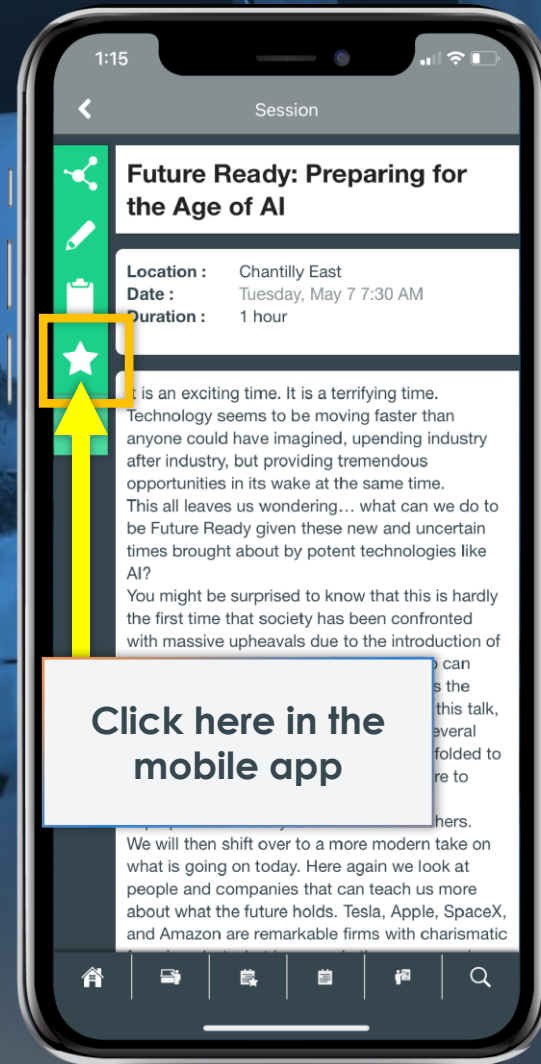
Oracle Guided Learning

SPEAKER:

Cameron McClurg

PRESENTATION ID:

P-050161



Complete 3 or more session surveys in a day and you'll be entered to win a **\$500 gift card!**

PeopleSoft

RECONNECT
AT BLUEPRINT4D *LIVE!*

JUNE 9 - 13, 2025
THE VENETIAN | LAS VEGAS, NV

PeopleSoft

RECONNECT

DIVE DEEP - VIRTUAL!

Save the Date:

October 27 - 30, 2025



Join us online for RECONNECT Dive Deep
Practical, hands-on learning for the PeopleSoft community.

At **PeopleSoft RECONNECT Dive Deep**, PeopleSoft customers of all levels can dig into new releases, dive deep into practical learning, get new ideas from best practices and hone their core PeopleSoft skills during four jam-packed digital days of education and networking. Attendees can chat with the experts, connect with and learn from other users and meet solutions providers.

All digital, all PeopleSoft – join us online **October 27 – 30, 2025**.

Call for presentations opens **June 25!**



Speaking at **RECONNECT Dive Deep** is a great way to build your reputation, meet new people and give back to the PeopleSoft community.

Plus primary speakers get discounted registration at the event!

questoraclecommunity.org/rcdd

SPEARMC SESSIONS AT BLUEPRINT 4D

Date	Time	Session Title	Presenter	Session #
June 10 th	4:00 PM	Executive Customer Panel - Oracle Guided Learning	Cameron McClurg	P-050161
June 11 th	4:00 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randall Johnson	P-050063
June 13 th	10:00 AM	Modernizing Grant and Subaward Management: A Comprehensive PeopleSoft Demo	Jessica Mann	P-050913

2025 TRAINING CALENDAR

Upcoming Class Schedule

Date	Session
June 10	PeopleTools – Activity Guides
June 17	PeopleTools – BI Publisher
June 19 – 20	PeopleTools – Portal Technologies
June 24 – 25	PeopleTools – Lifecycle Management & PUM
July 9	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
July 10	PeopleSoft 9.2 Query Advanced for FSCM
July 15 – 17	PeopleTools I & II
July 22 – 23	PeopleCode I & II
July 24	Oracle SQL for PeopleSoft
July 29 – 30	Application Engine

Visit our [website](#) for more information