

A light gray world map is centered in the background. An orange location marker, consisting of two concentric circles, is placed on the eastern coast of Australia. The text "Oracle Guided Learning Workshop" is overlaid on the right side of the map.

Oracle Guided Learning Workshop

HEUG Australia & New Zealand - Brisbane

October 30 – November 1, 2023

Brisbane Convention & Exhibition Centre

Your Presenter



ORACLE®
Certified Specialist

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Vice President

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(206) 819-7851

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

Agenda

- Introductions
- Build a Guide
- Play/Explore

Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR

Managed Services

- Application Support
- Testing as a Service
- System Administration
- Decustomization

Consulting Services

- Financials and Grants Mgmt
- Supply Chain Mgmt
- Human Capital Management
- Campus Solutions

PeopleSoft Training

- All Access Learning Pass
- Live Private Training
- Oracle Guided Learning
- Oracle University Reseller

Oracle Cloud Platform

- OCI Migration
- Infrastructure Hosting
- Disaster Recovery

Emerging Technology

- Kibana Data Analytics
- Chatbots and Digital Assistants
- Cloud Assessments

Proprietary Products

- PTF Testing Grounds
- Grants: LCD/Effort Reporting
- Supplier Contracts: Authoring
- Lease Admin: GASB 87

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 2023 Gartner Market Guide for Oracle Professional Services.

Recognition and Specializations

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
- Find out if your institution is already an E&I member: [click here](#)



PeopleSoft Public Training **Learn from an Oracle University Partner**

20 Public PeopleSoft Training Classes! Scheduled this coming Nov, Dec and Jan.

Includes new and popular classes for Tools, FSCM, HCM and Campus Solutions:

- OpenSearch Dashboards (formerly Kibana)
- Campus Solutions: Advisement, Admissions, Registration, Communications
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools Bootcamp, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker & REST Web Services
- Basic & Advanced Query for FSCM, HCM and Campus Solutions
- PeopleSoft Test Framework for FSCM, HCM and Campus Solutions



Visit our [website](#) for a full listing of available public courses and free webinars.

HEUG Australia & New Zealand

HEUG Sponsors Since 2014



Instructions

Initial Instructions

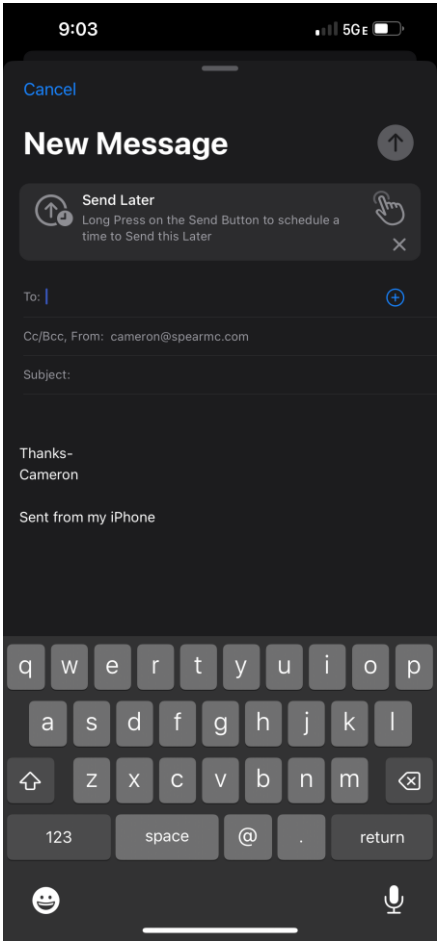
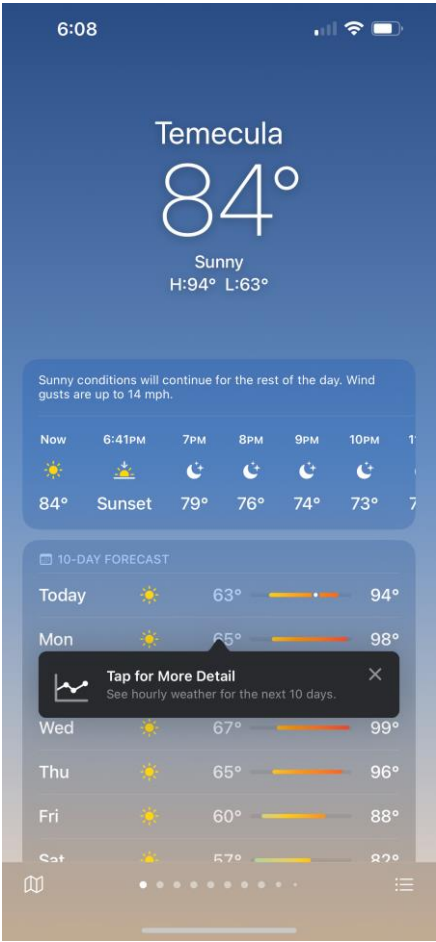
- You will receive logins to OGL and PeopleSoft
- You will receive a document with screenshots/steps (but feel free to play/explore!)

Other Details

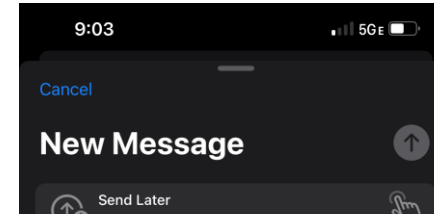
- Use Chrome or Edge
- When you login to OGL, you will need to install the Iridize app (a plugin to the browser)

About OGL

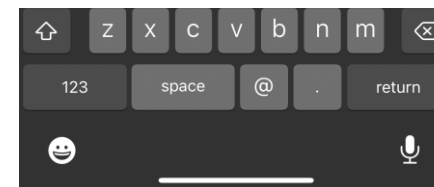
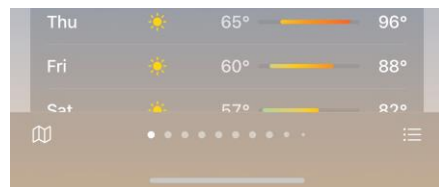
What is a Digital Adoption Platform



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)

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

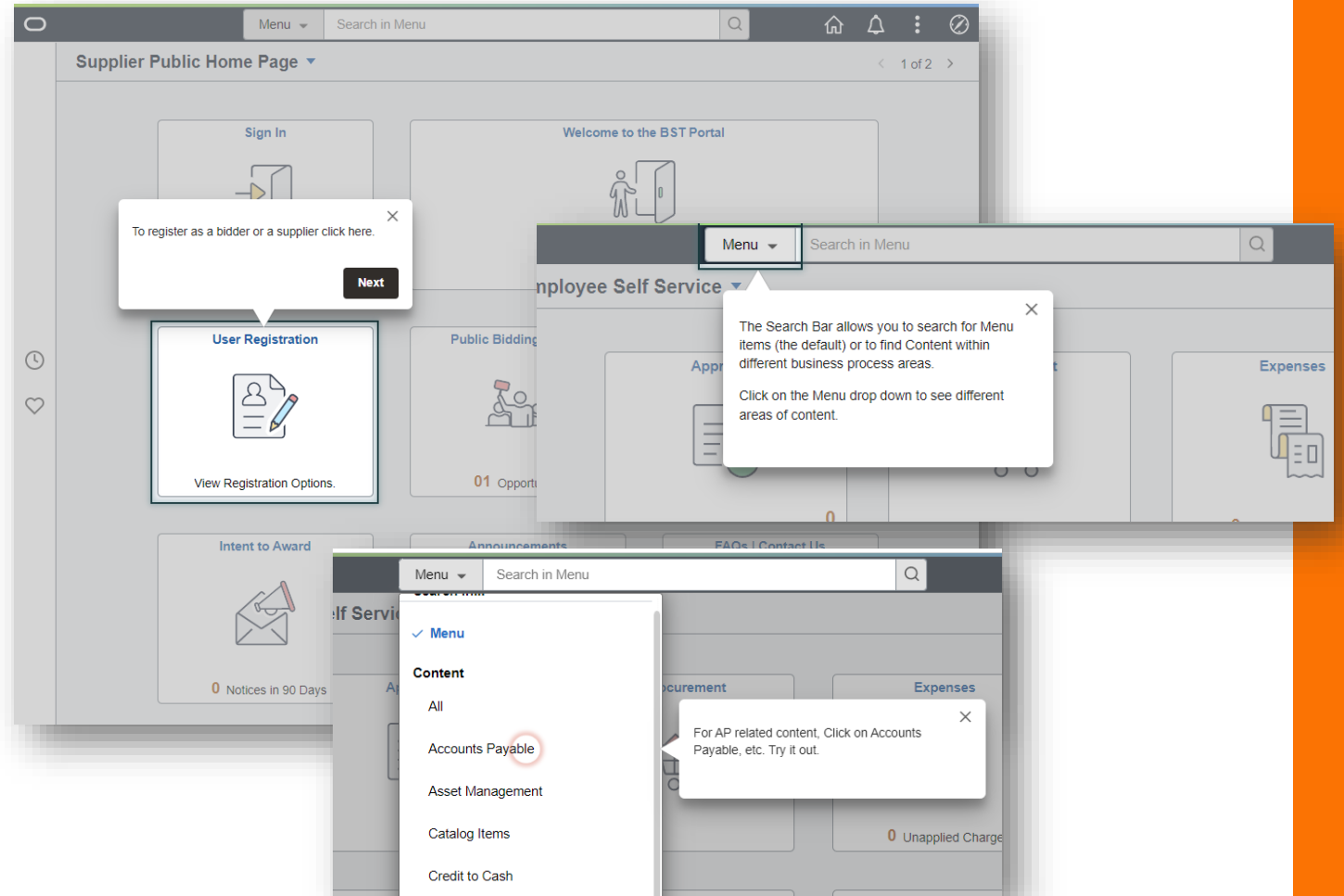
Find out what guides are being used and what transactions users are needing guides to get through

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



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



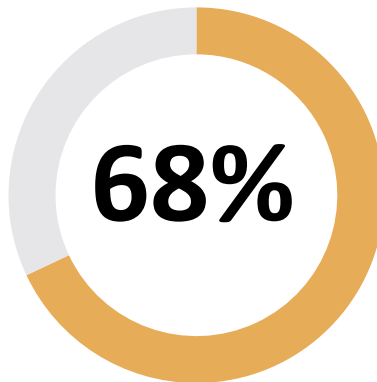
Manage Change Communications around upgrades, process, and policy changes



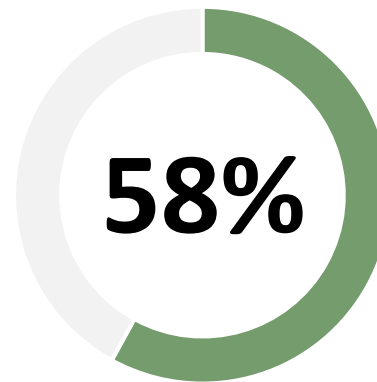
Users enabled through just-in-time, context-sensitive learning that is personalized for each role and your organization



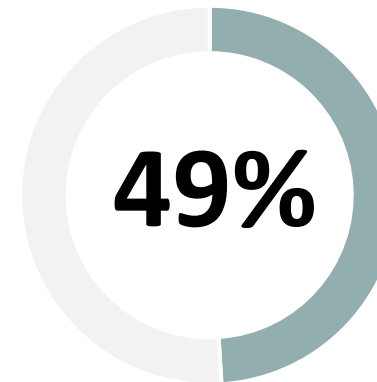
Fewer support calls and lower costs - analytics to consistently optimize usage/adoption



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

The screenshot displays the Oracle Guided Learning (OGL) interface. On the left, a 'Transfer Employee' content editor is open, showing a 'Current Step' with the instruction 'Enter Transfer empl in the Keyword Search bar.' The editor includes a 'Save & Close' button and a 'Preview' button. The main dashboard on the right features a grid of tiles representing various HR and financial metrics:

- Travel and Expense Activity:** A bar chart titled 'Top Expense Policy Violators' showing the count of violations for several employees.
- My Budget:** A donut chart showing '30% Budget Spend'.
- Company Directory:** A hierarchical tree diagram.
- My Team:** A diagram showing a manager connected to team members.
- Employee Snapshot:** A circular diagram representing an employee's profile.
- Team Time:** A clock icon with '26 Exceptions'.
- Absence Analytics:** A calendar icon with a pie chart.
- Team Performance:** A bar chart showing performance metrics with '8 In Progress Documents'.

A tooltip is visible over the 'My Budget' tile, stating: 'Enter Transfer empl in the Keyword Search bar.'

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 Analytics Dashboard. The top navigation bar includes 'Oracle Guided Learning' and 'Analytics Dashboard'. The main dashboard shows key metrics: 25 Active Guides, 51,193 Guide Runs, 79.5% completion, 13m30s average time, 2,047.7 views, and 5.9 rating. A line graph titled 'GUIDE RUNS' shows activity over time. A sidebar on the left lists various metrics like Total Users (15,029), Total Guides (96), Process (41), Message (0), Video (0), Link (2), Task List (0), Beacon (0), Smart Tip (53), and Training (0). A 'GUIDE DATA ANALYSIS' table lists applications and guides. A modal window for 'Report for Kaiser Development' is open, showing filters for Report Type (User), Date Range (2021-03-01 to 2021-03-31), Application(s), User(s), Guide Type, and Guide Status. The report table shows 58 rows with columns for Guide Name and Guide ID.

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-...	tqurjnse

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 collage illustrates the Oracle Guided Learning (OGL) interface. It includes screenshots of step-by-step guides for tasks like 'Add Banking Details', showing video guides, step-by-step instructions, and a print interface. It also shows an email interface where a user can send a step guide to another user, with a 'Send' button and a 'Subject' field. The email body contains a URL to view the guide.

OGL Pricing

SpearMC Consulting is the official OGL for PeopleSoft Value Add Partner

- Oracle Guided Learning pricing based on:
 - Number of Applications (All PeopleSoft Pillars count as one application), the minimum purchase allows for use of up to 3 applications.
 - Total Employee Headcount metric
 - Standard 3-year term
- SpearMC Initiation Services bundles Installation Support, 4 Guide Build and Advisory, and Training Workshop

Note: Additional Implementation and Starter Kit Sold Separately

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

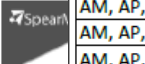
- Pre-built guides that can be used out of the box or modified for customer specific branding, language or custom steps.
 - Employee Self Service
 - Manager Self Service
 - Core Functions (Accounts Payable, Benefits Administration, Admissions)



**OGL for PeopleSoft
Starter Kit - FSCM**

SpearMC Consulting, Inc.
5020 Franklin Drive, Suite 1000
Pleasanton, CA 94588

FSCM Module	Guide
General	Intro to OGL with Remind Me Later Feature
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

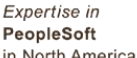


**OGL for PeopleSoft
Starter Kit - CS**

CS Module	Guide
General	Intro to OGL 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 Absences
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 Rules
Absence Management	Setting Up Self-Service Absence Transactions - Viewing Forecasting Rules for Self-Service
Absence Management	Manager Self-Service Scheduling - Managing Schedules, Overriding Shifts, and Selecting Shifts
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

ORACLE

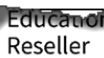
Partner

Expertise in
PeopleSoft
in North America

Expertise in
Oracle Cloud Platform
in North America

Oracle EPM Cloud
in North America

ORACLE

Education
Reseller

SpearMC
Recognized Vendor

AICPA
SOC 2

Questions





Thank You

CAMERON MCCLURG

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SpearMC Sessions

Date	Time	Session Title	Session #
30-Oct-23	10:30 AM - 12:00 PM	Oracle Guided Learning: Build a Guided Process Cameron McClurg (SpearMC)	8504
31-Oct-23	2:00 PM - 2:55 PM	Automating Billing in a Matrixed Organization Teresa Leung (Kaiser) & Jessica Mann (SpearMC)	8537
1-Nov-23	9:00 AM - 9:55 AM	De-Customize PeopleSoft By Utilizing Out Of The Box Features Cameron McClurg (SpearMC)	8577
	10:30 AM - 11:25 AM	Oracle Guided Learning: End User Training Made Easy Teresa Leung (Kaiser) & Jessica Mann (SpearMC)	8535
	11:30 AM - 12:25PM	Customer Panel: Oracle Guided Learning Cameron McClurg (SpearMC)	8505

2023 Training Calendar

November Class Schedule

Nov 14 & 16	PeopleTools 8.58-8.60 Bootcamp
Nov 16	PeopleSoft 9.2 Query Basic and Intermediate for FSCM
Nov 17	PeopleSoft 9.2 Query Advanced for FSCM
Nov 27	PeopleSoft 9.2 Query Basic and Intermediate for HCM
Nov 28	PeopleSoft 9.2 Query Advanced for HCM
Nov 30	PeopleTools 8.58 - 8.60 PeopleCode and Object-Oriented Programming (OOP)

Visit our [website](#) for additional details

2023 Training Calendar

December Class Schedule

Dec 5	PeopleSoft 9.2 Campus Solutions: Student Records & Registration
Dec 7	PeopleTools 8.58-8.60 Fluid User Interface
Dec 11	Automated Testing with PeopleSoft Test Framework for Campus Solutions
Dec 11	PeopleSoft 9.2 Query Basic and Intermediate for Campus Solutions
Dec 12	PeopleSoft 9.2 Campus Solutions: Academic Advisement
Dec 13	PeopleSoft 9.2 Query Advanced for Campus Solutions
Dec 14	PeopleTools 8.58-8.60 Integration Broker and REST Web Services
Dec 15	PeopleSoft 9.2 Campus Solutions: Admissions Applications

Visit our [website](#) for additional details

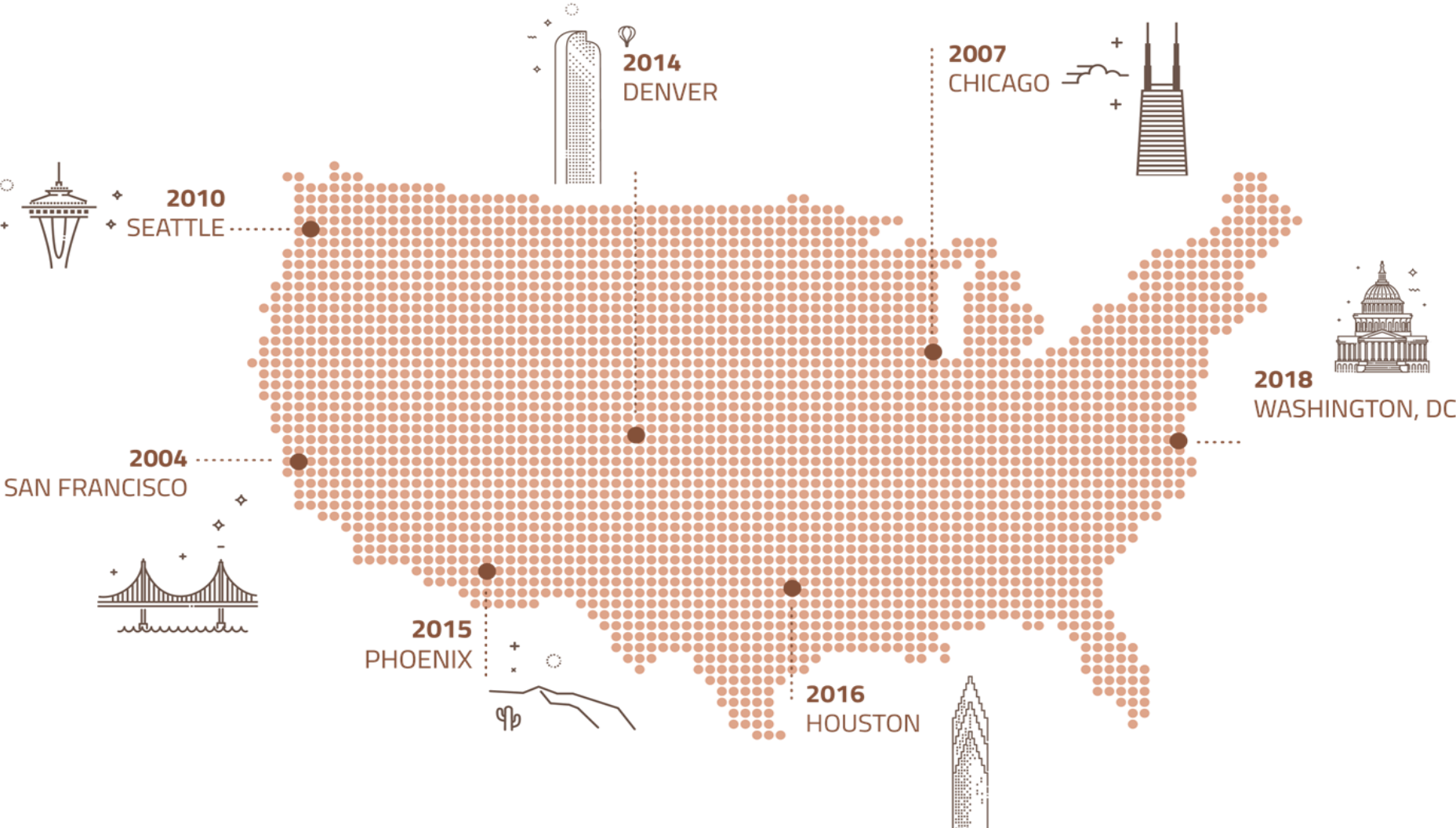
2024 Training Calendar

January Class Schedule

Jan 10-11, 17-18	PeopleTools 8.58-8.60 System Administration
Jan 23	PeopleTools 8.59-8.60 OpenSearch Dashboards (formerly Kibana)
Jan 26	PeopleSoft 9.2 Campus Solutions 3Cs: Communications, Checklists and Comments

Visit our [website](#) for additional details

Coast-to-Coast Coverage



Industry Experience

Trusted Domain Experts

While SpearMC serves a wide variety of organizations, we have deep knowledge in a number of specific industry verticals.



HEALTHCARE

Streamlining processes to improve outcomes and fuel innovation.



FINANCIAL SERVICES

Mitigating risk and building stronger customer relationships.



HIGHER EDUCATION

Supporting the success of students, staff, and institutions.



PUBLIC SECTOR

Meeting user, procurement, and legal requirements.

Managed Services

PeopleSoft Managed Services



Testing as
a Service



Infrastructure
Hosting



Technical
Support



Functional
Support



Staying Current



PeopleSoft Roadmap Specialist

We follow a structured approach for gathering information, analyzing issues, identifying pain points and proposing applicable solutions.

Our recommendations encompass the people, end-to-end processes and technology aspects associated with your PeopleSoft platform.

