

A light gray world map is centered in the background. A red location pin with a white center is placed on the eastern coast of Australia, specifically near Brisbane.

Oracle Guided Learning – End User Training Made Easy

HEUG Australia & New Zealand - Brisbane

October 30 – November 1, 2023

Brisbane Convention & Exhibition Centre

Your Presenters



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Executive Director, KFRI
Kaiser Permanente
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Jessica Mann

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Agenda

- Introductions
- Oracle Guided Learning Overview
- Oracle Guided Learning at Kaiser Permanente
- Demo
- KP OGL Lessons Learned

About Kaiser Permanente

We Are the Nation’s Largest Integrated Health System...



23.7 K + physicians
deliver high-quality care to Kaiser Permanente members

12.6 M people
get care + coverage from Kaiser Permanente



\$93.1B revenue





217K + employees
improving the health of people + communities



39 Hospitals



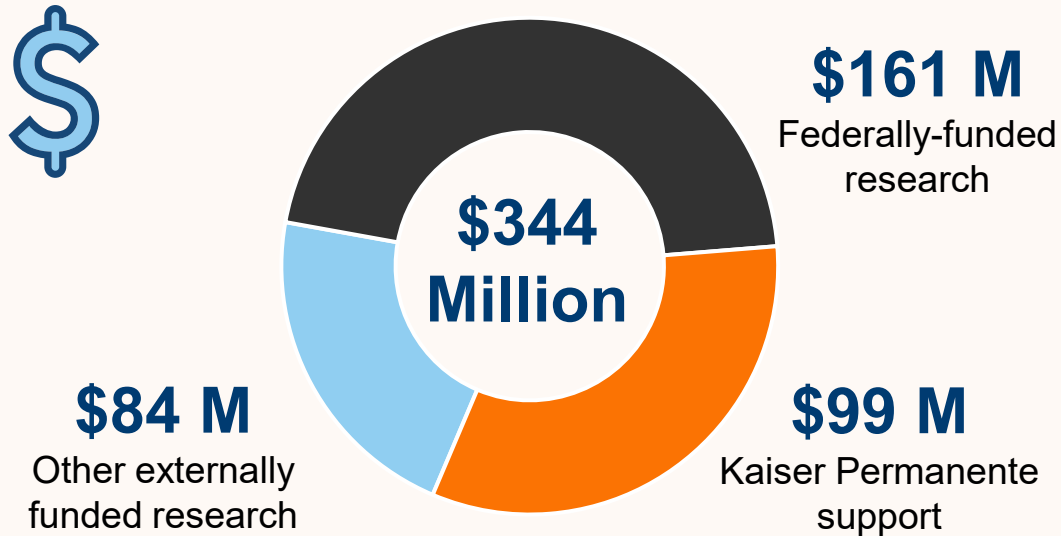
+ 734 medical offices

65 K + nurses
are at the center of our care

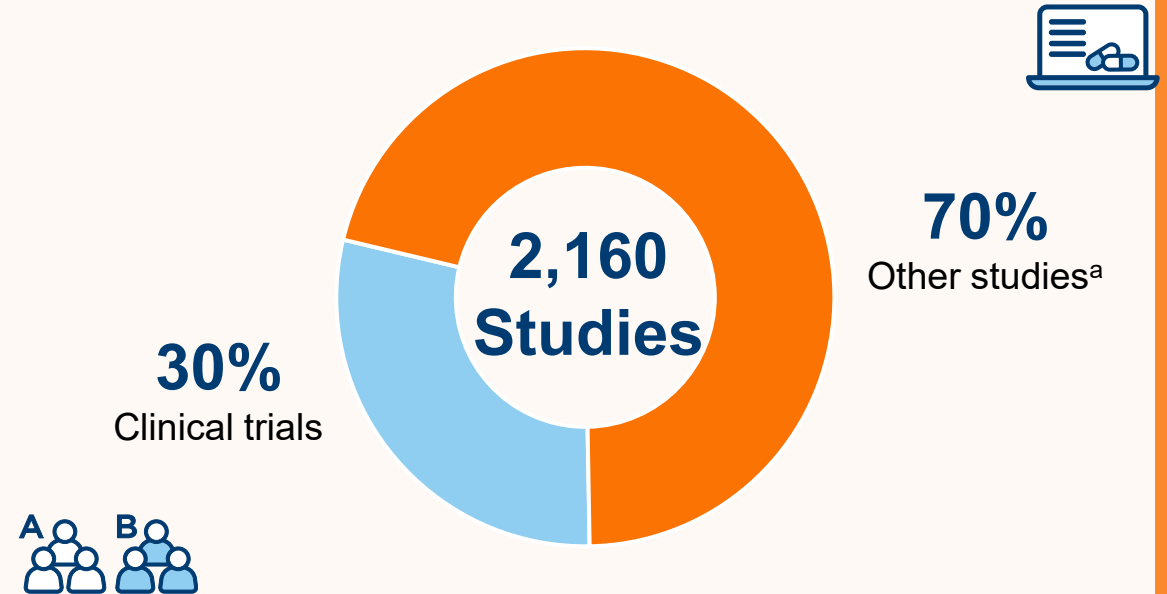


Kaiser Permanente Research Fast Facts, 2022

Funding in 2022^a



Research Studies Underway in 2022



Research Personnel^a



Research Publications

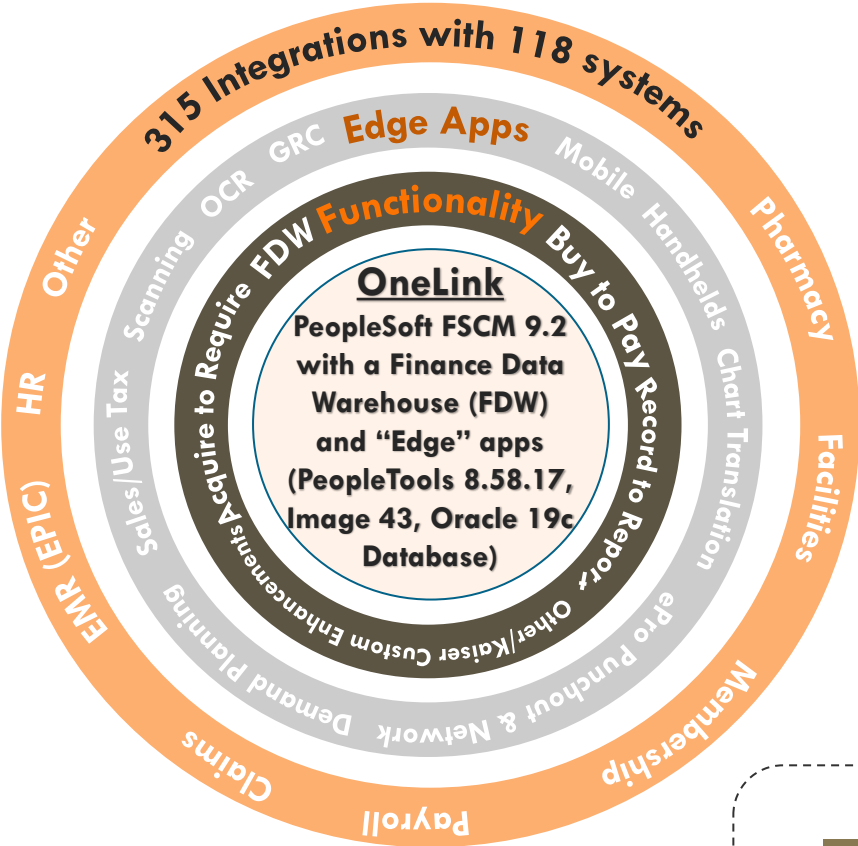


^aRefers to the 9 research centers (8 regional centers and KPSOM)

^bRefers to total count of all articles (research and non-research) from 2000 to the present in the Kaiser Permanente Publications Library available at <https://kpresearchpublications.kp.org/>

OneLink Platform Overview

Platform Functions



Procure to Pay (Buy 2 Pay)

- eProcurement
- Purchasing
- Inventory & Cost Management
- eSupplier Portal
- Services Procurement
- Accounts Payable
- eSettlements
- Travel and Expenses
- Sourcing
- Supplier Contract Management

Record to Report

- Treasury
- General Ledger
- Grants, AR, Billing, Contracts
- Time Reporting

Acquire to Retire

- Asset Management
- Lease Management
- Project Costing
- Commitment Control

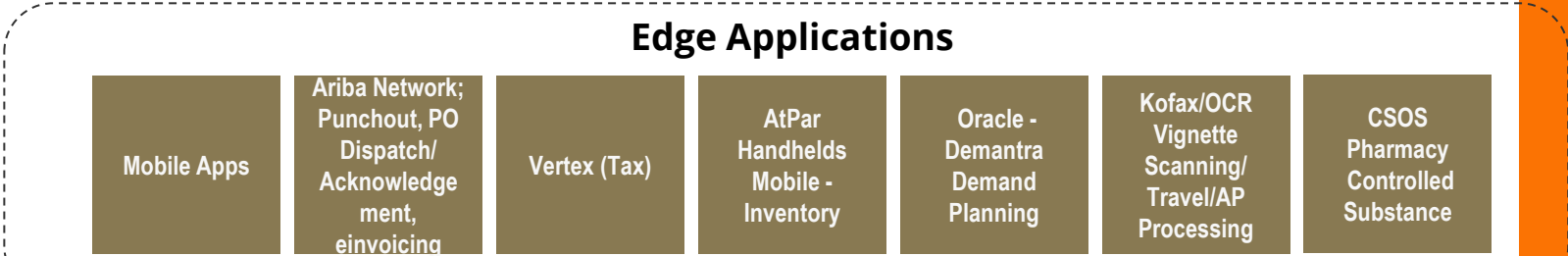
Fin. Data Warehouse (FDW)

- Reporting / Analytics
- Cognos

Kaiser Custom

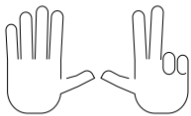
- POU (Point-of-Use)
- FDA (Funds Disbursement Authorization)
- GL Chartfield Translation Tool

Edge Applications





OUR DEPLOYMENTS



STANDARDIZED
ACROSS ALL OF
OUR 8 REGIONS

900,000
Jobs Processed Monthly

OUR CAPABILITIES

- Systems Strategy
- Systems Implementation
- Governance
- Project Management
- Process Optimization
- Reporting and Analytics
- Production Support



ONELINK BY THE NUMBERS

248,000 Users

Approximately 12,000 employees use OneLink daily, processing over 75 Million distinct financial, supply chain and general support transactions annually

Accounts Payable	
Transactions Amount	
9.9 Million	\$24.6 Billion

Purchase Orders	
Transactions Amount	
4.3 Million	\$13.4 Billion

Expense Reports	
Transactions Amount	
470 K	\$311 Million

sPro Invoices	
Invoices Amount	
257 K	\$789 Million



FAST FACTS

Production Support Tickets

40,700	39,500
Tickets Opened	Tickets Resolved
(Oct 17 – Sept 18)	(Oct 17 – Sept 18)

70%
Tickets resolved
within 2 days

93%
Tickets resolved within
21 days

99%
System Availability

LARGEST PEOPLESOFT SINGLE-
INSTANCE IN THE HEALTHCARE
INDUSTRY

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.

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 Sponsors Since 2014



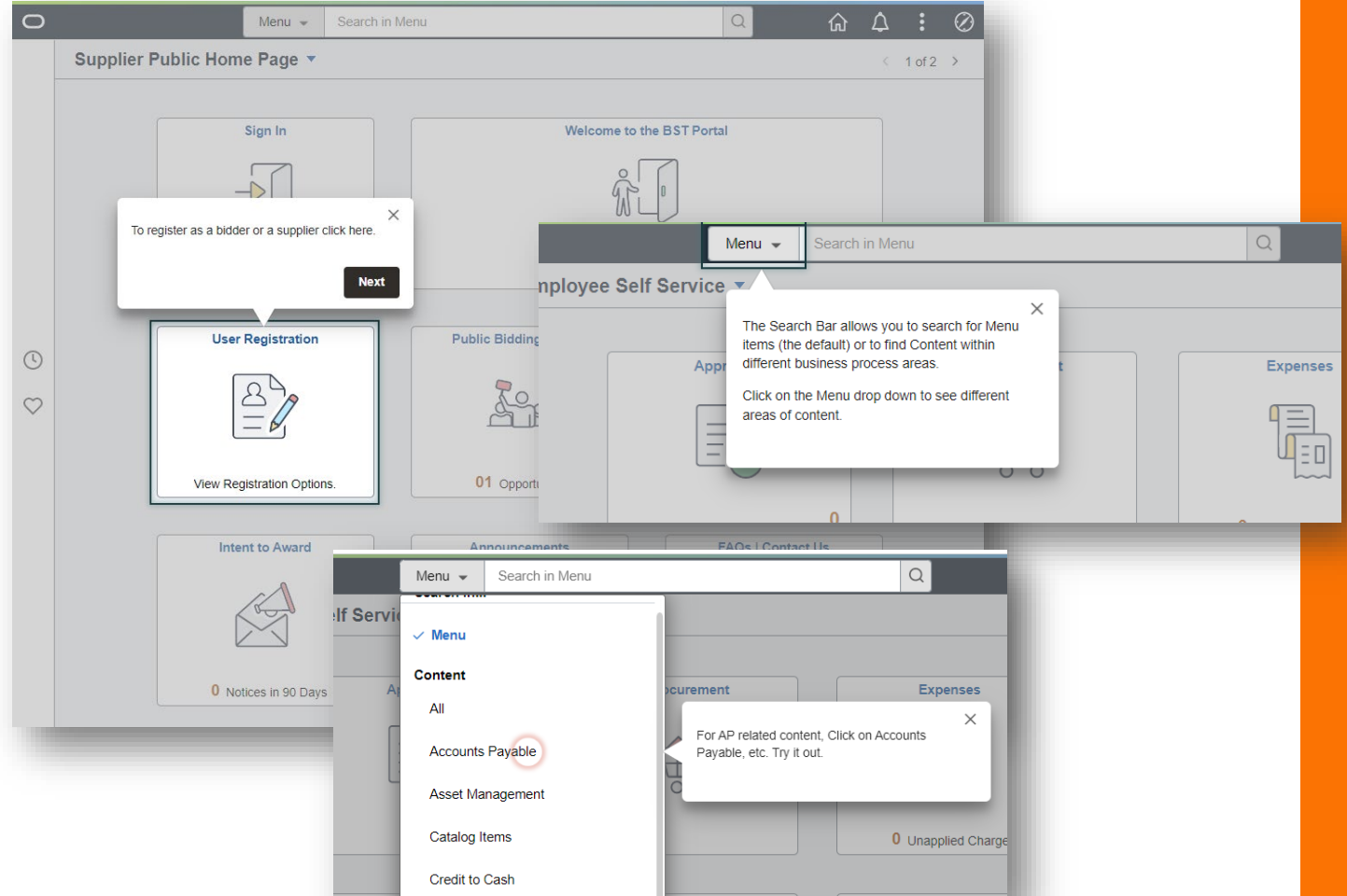
Oracle Guided Learning Overview

What is Oracle Guided Learning (OGL)

In-application guidance to accelerate your Oracle enablement

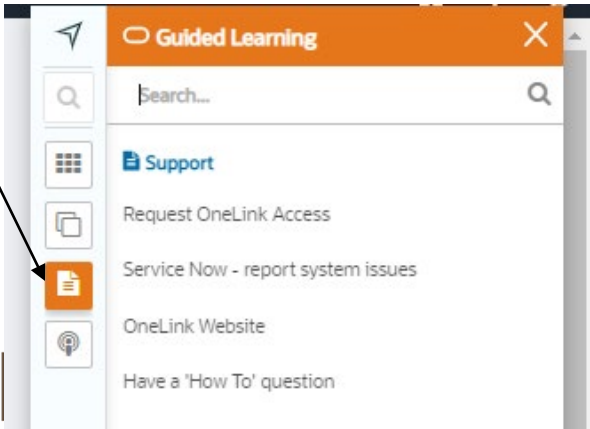
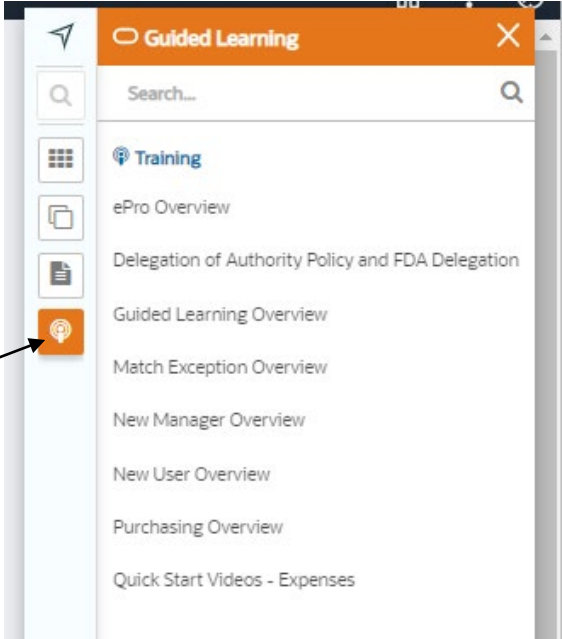
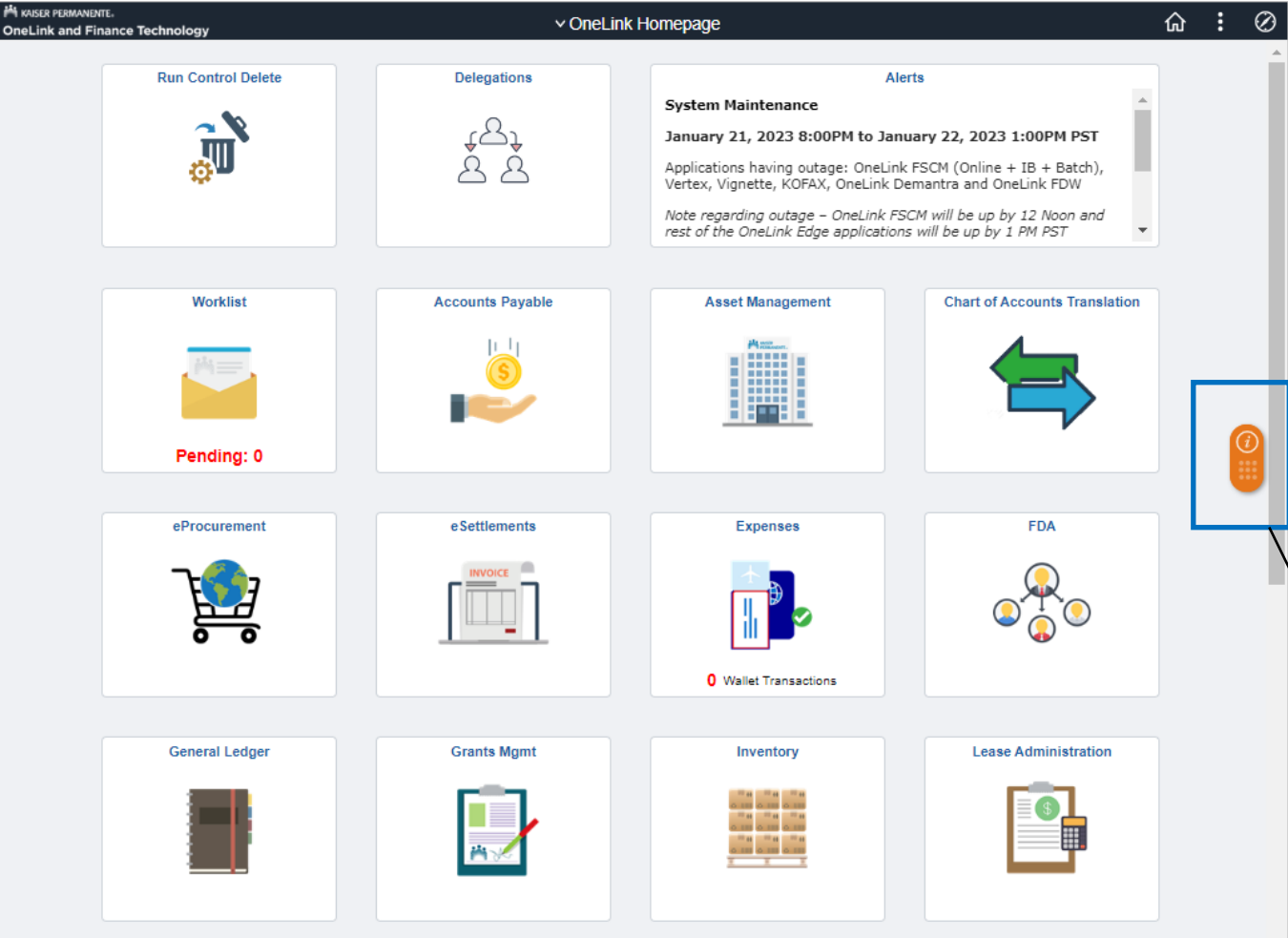
Oracle Guided Learning delivers immediate value throughout the entire life cycle and provides benefits that enable you to focus on your priorities

- 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.



Oracle Guided Learning at Kaiser Permanente

OGL at Kaiser Permanente - Grants



OGI at Kaiser Permanente – Grants

Run Control Delete

Delegations

Alerts

System Maintenance

Worklist

Accounts Payable

Asset Management

Chart of Accounts Translation

eProcurement

eSettlements

Expenses

FDA

General Ledger

Grants Mgmt

Inventory

Lease Administration

OneLink Homepage

OneLink and Finance Technology

January 21, 2023 8:00PM to January 22, 2023 1:00PM PST

Applications having outage: OneLink FSCM (Online + IB + Batch), Vertex, Vignette, KOFAX, OneLink Demantra and OneLink FDW

Note regarding outage – OneLink FSCM will be up by 12 Noon and rest of the OneLink Edge applications will be up by 1 PM PST

Pending: 0

0 Wallet Transactions

Guided Learning

Search...

Interactive Guides

Acknowledge FDA delegation – FDA workflow

Modify FDA delegation

Add team member to PAT

Approve a work order

Approve or deny an expense report

Approve or deny PAT

Approve or deny progress log

Approve service request

Assign alternate approver while out of office

Assign expense report preparer

Manage On Behalf Of - FDA

Cancel service request

Certify effort - PAT

Create a Payment Request

Guided Learning

PAT

Guides available on the current page

Add team member to PAT

Certify Effort - PAT

Create Effort - PAT

Approve or deny PAT

Create PAT statistics

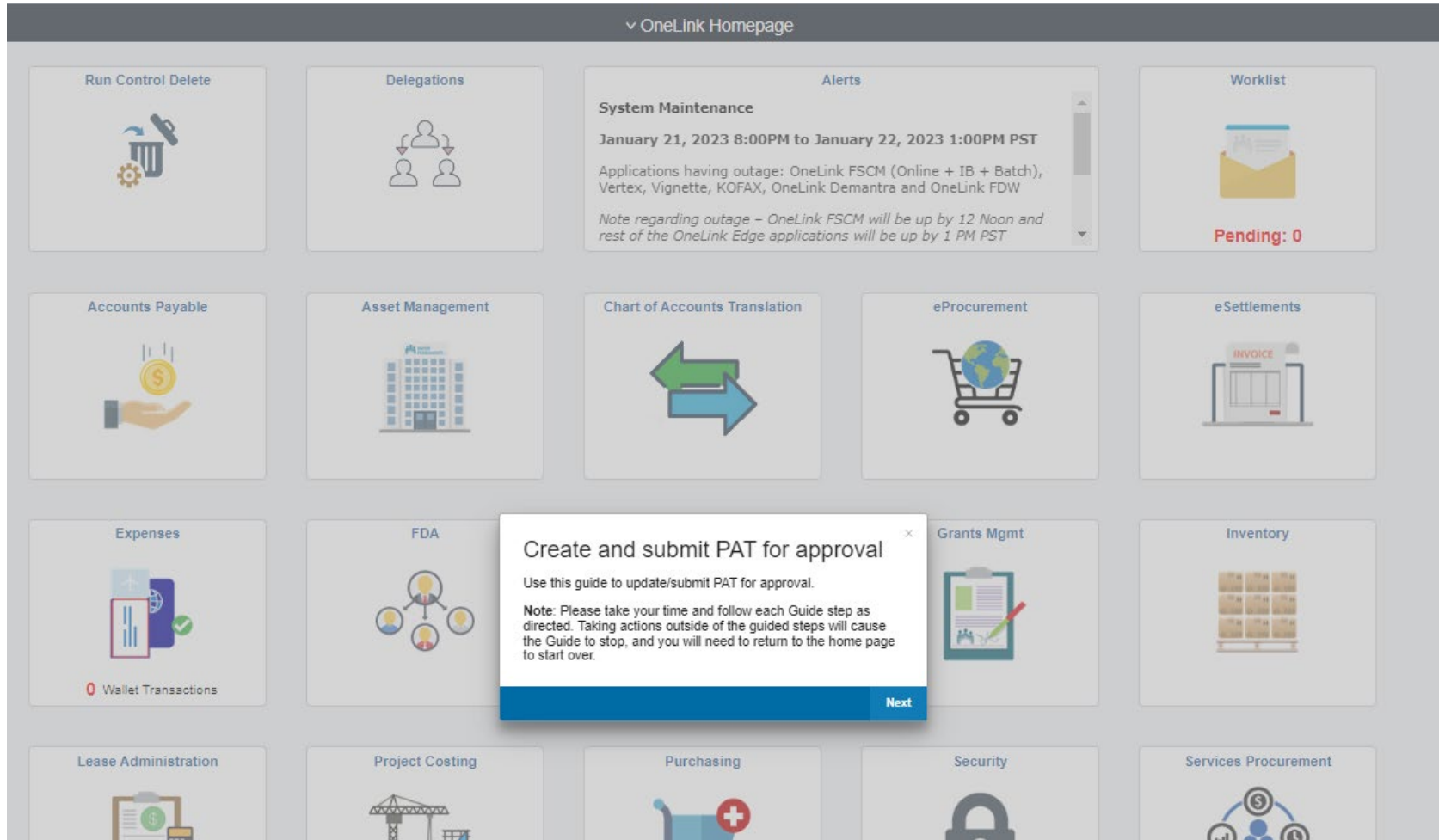
Create and submit PAT for approval

Create a Payment Request

Search for payment information

Finalize grants payment worksheets

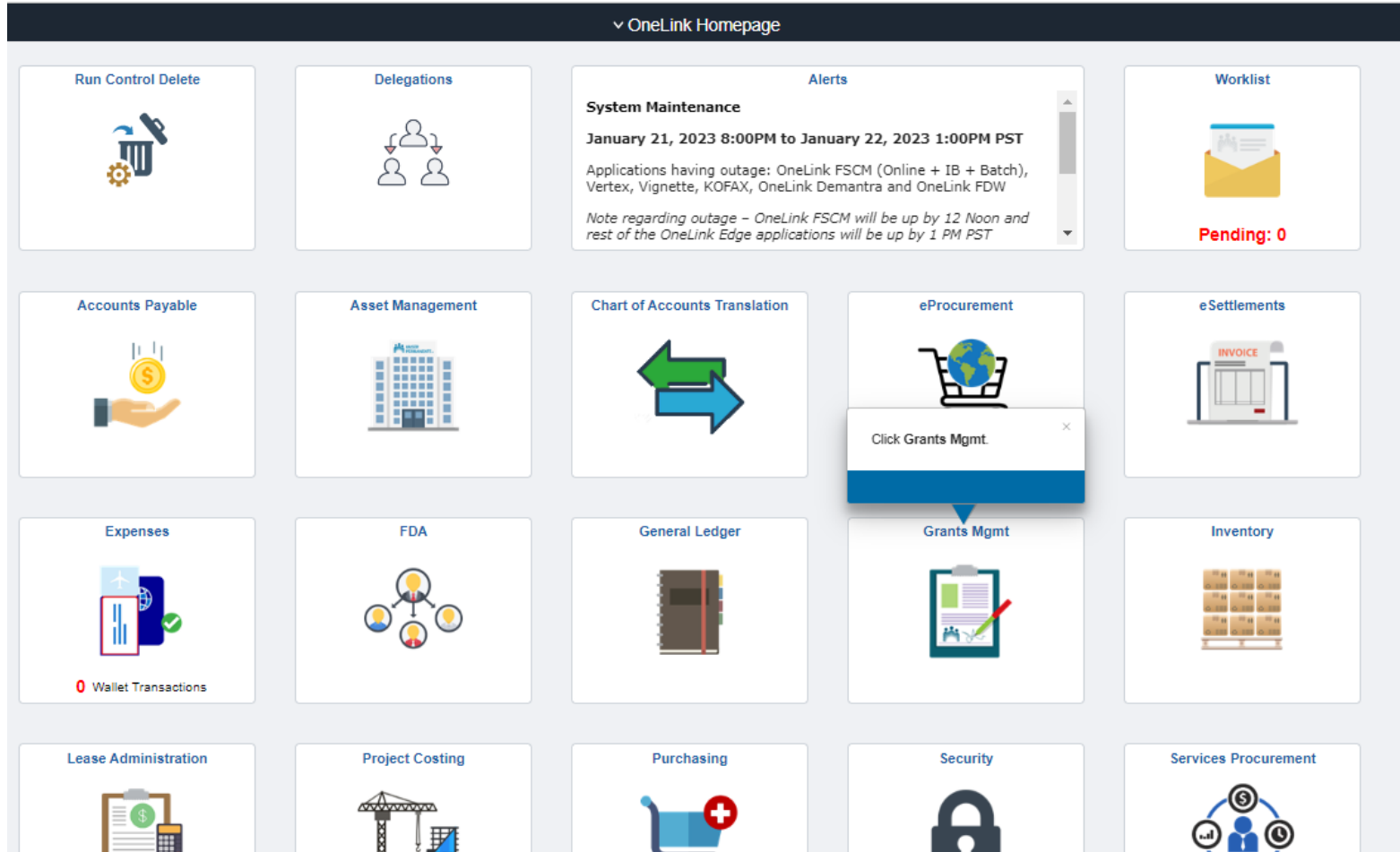
OGL at Kaiser Permanente – Grants



Follow the steps in the guide, performing each action as indicated

Note: For steps that require a definitive action (e.g., click Grants Management), the guide will move forward automatically. Some steps require you to click Next.

OGL at Kaiser Permanente – Grants



Follow the steps in the guide, performing each action as indicated

Note: For steps that require a definitive action (e.g., click Grants Management), the guide will move forward automatically. Some steps require you to click Next.

OGL at Kaiser Permanente – Grants

OneLink Homepage

Grants Mgmt

Worklist

Grants

Project Costing

Customer Contracts

Billing

Accounts Receivable

Reporting

Project Allocation

Effort

Process Monitor

Worklist

Worklist for H248229: Jessica A Mann

Detail View

Worklist Filters

Feed

Worklist Items

1-1 of 1

View All

From	Date From	Work Item	Worked By Activity	Priority	Link

Select Project Allocation.

Refresh

OGL at Kaiser Permanente – Grants

< OneLink Homepage

Grants Mgmt

Worklist

Grants

Project Costing

Customer Contracts

Billing

Accounts Receivable

Reporting

Project Allocation

Effort

Process Monitor

Project Allocation Template

Mass Approval

Create Statistics

Organization - PAT

DDP Default by NUID

Project Allocation Template

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

Search by: Empl ID begins with

Search

Advanced Search

OGL at Kaiser Permanente – Grants

< OneLink Homepage

Grants Mgmt

Worklist

Grants

Project Costing

Customer Contracts

Billing

Accounts Receivable

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Project Allocation

Project Allocation Template

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Create Statistics

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Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

Search by: Empl ID begins with

Search

Advanced Search

Find an Existing Value

Add a New Value

Optional Step: Enter the desired NUID.

Click Next.

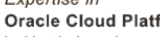
Next

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Oracle

Partner

Expertise in PeopleSoft in North America

Oracle

Expertise in Oracle Cloud Platform in North America

Oracle

Expertise in Oracle EPM Cloud in North America

Education Reseller

Gartner
Recognized Vendor



22

OGI at Kaiser Permanente – Grants

< OneLink Homepage

Grants Mgmt

Worklist

Grants

Project Costing

Customer Contracts

Billing

Accounts Receivable

Reporting

Project Allocation

Project Allocation Template

Mass Approval

Create Statistics

Organization - PAT

DDP Default by NUID

Effort

Process Monitor

Project Allocation Template

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

Search by: Empl ID begins with K8

Search

Advanced Search

Click Search.

Note: If no NUID was entered above, select desired NUID from the Search Results.

Back

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Oracle

Partner

Expertise in
PeopleSoft
in North America

Expertise in
Oracle Cloud Platform
in North America

Expertise in
Oracle EPM Cloud
in North America

Oracle

Education
Reseller

Gartner

Recognized Vendor



23

OGL at Kaiser Permanente - Grants

OneLink Homepage

Grants Mgmt

Worklist

Grants

Project Costing

Customer Contracts

Billing

Accounts Receivable

Reporting

Project Allocation

Mass Approval

Create Statistics

Organization - PAT

DDP Default by NUID

Effort

Process Monitor

Project Allocation Template | Statistics | PAT Approval

Empl ID K6 Jar
Earliest Start Date Available: 02/16/2023

Project Allocation Template

Start Date 01/01/2023 End Date 12/31/2099 Status Approved Regular PAT

	Business Unit	Project	Descr	Status	Project End Date	PM	DIST%	Change Flag	Hours		
1	REG11	ADM000214	Sci Core Innovation F&A	Approved	12/31/2023	Mc	4.00	☒	3.20		
2	REG11	ADM006188	Required Fac Compliance Effort	Auto Approved	12/31/2023	Mc	5.00	☐	4.00		
3	REG11	ADM020078	Approved Fac Admin Effort	Auto Approved	12/31/2023	Mc	10.00	☐	8.00		
4	REG11	RNG209815	CATALyST Main	Auto Approved	09/29/2023	Br	10.00	☐	8.00		
			Lynx Study	Auto Approved	06/30/2023	Sc	1.00	☒	0.80		
			STAR-C-VTF	Auto Approved	05/31/2023	Tr	1.00	☐	0.80		
7	REG11	RNG210011	KP Research Bank - KPWA	Auto Approved	12/31/2023	Sc	5.00	☒	4.00		
8	REG11	RNG210354	Analytics Complex Care	Approved	09/29/2023	Ho	10.00	☒	8.00		
9	REG11	RNG210723	CLUE Renewal	Approved	04/30/2025	Ho	10.00	☒	8.00		
10	REG11	RNG210992	Preventing Hypoglycemia	Auto Approved	02/28/2025	En	25.00	☐	20.00		

Updated By Erik 01/10/23 12:00:09.000000PM

Submit for Approval

Save Return to Search

Project Allocation Template | Statistics | PAT Approval

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 – Approach



- Audience Analysis
 - Large/Casual users
 - External users
 - New users added often

Create Expense Report



- Transaction Analysis
 - Frequency, Complexity
 - What to exclude



- Business Feedback
 - Transactions added/removed

OGL at Kaiser Permanente

How do we Measure Success?

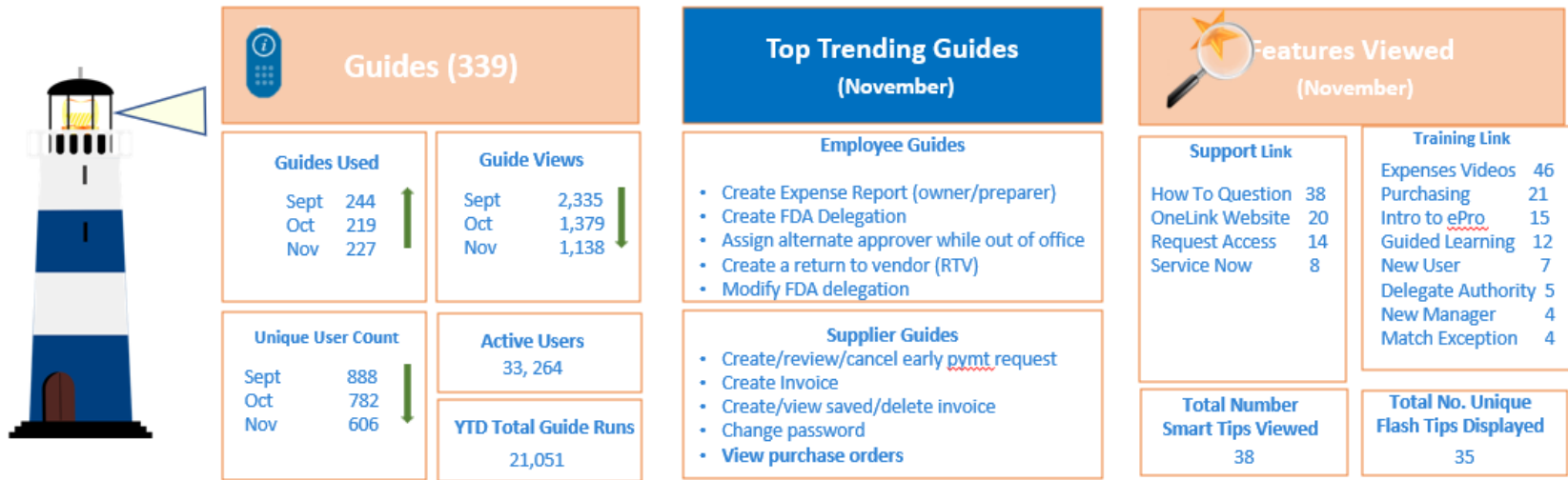
- Monthly tracking and trending of:
 - Guides used
 - Guides viewed
 - Unique Users (Employee and Supplier)
 - Top Trending Guides (Employee and Supplier)
 - Unique Flash Tips and Smart Tips viewed
 - Support and Training Links selected
 - Task List Usage

OGI at Kaiser Permanente

What does the data tell us?

- Monthly tracking and trending of
- Guide usage increases after system enhancement or business process changes have been introduced
- Flash Tips views notify users of system or policy changes
- Top Trending Guides are relatively stable, but are also seasonal, for example, increase usage of Renew FDA – Annual Renewal during July and August during annual renewal period
- Support and Training Display Group links are used consistently and have trended up over last year

OGI at Kaiser Permanente – Dashboard



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

OGL at Kaiser Permanente – Dashboard

Oracle Guided Learning (Premium)

Kaiser Development ... / Onelink Production

Day Week Month Quarter Year

NAMER charlie.lara@kp.org

HOME

This page does not use date

587

Guides

447

Process

53

Message

57

Beacon/Smart Tip

12

Training

5

Task List

My Content

Content (600)

Archive (493)

Settings

Analytics & Reports

Dashboards

Optimization

Activity

Application

Content

Feedback

Hotspots

GUIDE DATA ANALYSIS

Archive (493)

Settings

Analytics & Reports

Dashboards

Optimization

Activity

Application

Content

Feedback

Hotspots

Search Terms

Surveys

Users

Reports

Report for Kaiser Development Account

Download Report

Preview

Update Preview

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 / (2), Guide(s): ALL, User(s): ALL, Module: 2 selected / (24), Environment: Production, Export Format: XLSX

COLUMNS

4 Selected

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

Row Count: 53

Notes

Filters

Archive

Include archived guides

Date Range

Day Week Month

Quarter Year

From: 2022-01-01 To: 2022-12-31

Use Date Range

Export Format

CSV JSON XLSX

Reset

Environment *

Production

Platform

Select Platform(s)

Guide Type

Process

Guide Status

OGL at Kaiser Permanente – Grants

- Guides for Grants were developed in conjunction of the Bernard J Tyson School of Medicine (SoM) grants implementation
- Guides were used to deliver proctored training to SoM grants users in lieu traditional classroom training
- Training consisted of using the guides to complete grant related transactions
- In addition to the expected training benefits, the setting helped to break down functional barriers and stimulate discussion on how to improve business processes both large and small
- Guides were updated immediately to reflect additional steps, information, or corrections if needed
- Users highly rated the experience and felt confident in their abilities knowing that the guides would be available in Production

OGI at Kaiser Permanente – Grants

Guide Name

Add Grants Project Activities

Add/Copy/Update Grant Award Milestones

[Approve or Deny PAT \(Project Allocation Template\)](#)

[Certify Effort - PAT](#)

Copy a Grants Proposal

Create a Grants Proposal

[Create and Submit PAT for Approval](#)

[Create Effort – PAT](#)

[Create Expense Certification](#) 

Create Grants Accounting Entries for Direct Journal Payments

Create Grants AR Cash Deposit

Create Grants Billing Worksheet and Apply Cash

Guide Name

Create Grants Fixed Price Bill

[Create PAT Statistics](#)

Create/Maintain Grants Prepaid Contract Lines

Finalize a Grants Budget

Finalize Grants AR Worksheet for On Account Items

Finalize Grants Payment Worksheets

Generate a Grants Award

Maintain a Grants Award Profile

Maintain Grants Contract - Cost Reimbursable

Maintain Grants Contract - Fixed Price

Maintain Grants Items for On-Account Entries



Added with Billing Automation Project 4/2023



Includes Smart Tip

OGI at Kaiser Permanente – Grants

Guide Name

Maintain Grants Project

Maintain Grants Project Location

Print Grants Proforma Invoice

Process Billing using Business Process Weaver



Process Grants Award Amendments

Process Grants LOC Draw Down

Process Streamlined Billing (for Amount Based Billing)



Review and Certify Expenses



Review Invoice Image



Run As Incurred Billing & Status Report



Run Grants Bill Interface

Guide Name

Run Grants Bill Interface

Run Grants Contract Bill Interface

Run Grants Fixed Price Bill Interface

Submit a Grants Proposal

Update Billing Plan to use Streamline Billing



Update Grants Project Team

Update/Approve Grants Bill Worksheet

OGI at Kaiser Permanente - Grants

OneLink Homepage

Grants Mgmt

New Window

Help

Personalize Page

Single Action Invoice

Print Pro Forma

Reprint Invoices

Load Invoices to AR

Create Accounting Entries

Letter of Credit Pro Forma

Letter of Credit

Reprint Letter of Credit

Update Contract/Projects Data

Bills Not Invoiced

Bills Invoiced

Review Bill Summary

Review Bill Details

Review Entries by Invoice

As Incurred Bill & Rev Sta

As Incurred Bill & Rev Status

Run Control ID: AS_INC_BILL_REV

Report Manager

Run Control Parameters

*From Business Unit

*To Business Unit

Project Type

Project

Billing Specialist

*Accounting From Date

*Accounting To Date

View Log/Trace

Report

Report ID 98310297

Process Instance 103389302

Name KP_INCINV_EX

Process Type Application Engine

Run Status Success

Incurring Invoice Report

Distribution Details

Distribution Node FSCM_DIC

Expiration Date 07/08/2023

File List

Name

File

AE_KP_INCINV_EX_103389302.stdout

527

AE_KP_INCINV_EX_103389302_0608085322.AET

4

Incurring_Invoice_Expense_Report103389302.xls

309

Distribute To

Distribution ID Type

Distribution ID

User H248229

Return

Column

Description

Contract Business Unit

Contract

Project Costing Business Unit

Project ID

Activity ID

Project Type

Project Title

Customer Name

CA Status

Contract Status

CA Type

Contract Type

Billing Specialist

Line Num

Product

Bill Plan

BP Status

Billing Plan Status

BP Hold

Billing Plan Hold Status

CA Line End Date

Rev Plan

RP Status

Revenue Plan Status

RP Hold

Revenue Plan Hold Status

LOC Doc ID

LOC ID

CA Limit

Contract Limit

Costs

Analysis Types included in the KPEXP Analysis Group with Accounting Dates in the Range Entered on the Run Control

DEF

Analysis Types DEF with Accounting Dates in the Range Entered on the Run Control

BIL

Analysis Types BIL with Accounting Dates in the Range Entered on the Run Control

OLT

Analysis Types OLT with Accounting Dates in the Range Entered on the Run Control

BLD

Analysis Types BLD with Accounting Dates in the Range Entered on the Run Control

BAJ

Analysis Types BAJ with Accounting Dates in the Range Entered on the Run Control

Costs - Billing

Analysis Types included in the KPEXP Analysis Group less BIL less OLT less BLD less DEF with Accounting Dates in the Range Entered on the Run Control

UTL

Analysis Types UTL with Accounting Dates in the Range Entered on the Run Control

Rev Not Processed

Analysis Types 'DEF', 'BIL', 'BLD', 'BAJ' with GL Distrib Status in this list 'C', 'H', 'J', 'M', 'N', 'P', 'X' with Accounting Dates in the Range Entered on the Run Control

UTL Not Processed

Analysis Type 'UTL' with GL Distrib Status in this list 'C', 'H', 'J', 'M', 'N', 'P', 'X' with Accounting Dates in the Range Entered on the Run Control

Expertise in Oracle Cloud Platform in North America

Expertise in Oracle EPM Cloud in North America

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AICPA SOC 2

34

KP Oracle Guided Learning Lessons Learned

Lessons Learned / Benefits

- Guides have lead to a decrease in 'How To' calls to Production!
- Most frequently used guides for KP include Expenses, ePro, and eSettlements as well as guides to support new functionality
- Easier to engage business after a draft guide was create than upfront
- Efficient and relevant way to learn in the production environment as well as training environment
- Effective way to inform users of changes or issues (Flash Tips)
- Task Lists - useful for multi-step processing and when some of the steps are outside of the application
- While there has been a reduction of job aids and associated maintenance overhead, there still is ongoing guide maintenance for PUMs or KP driven enhancements
- Usage Reporting/Analytics extremely helpful



Thank
You

Pricing

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

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**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
AM, AP, & GL	Using Control Groups - Entering Vouchers into Control Groups

**OGL for PeopleSoft
Starter Kit - CS**

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

HCM 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
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

**OGL for PeopleSoft
Starter Kit - HR**

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

HR Module	Guide
General	Intro to OGL with Remind Me Later Feature
General	Survey Starter
Recruitment	Managing Recruitment - Defining Recruitment
Recruitment	Managing Recruitment - Creating and Viewing Recruitment
Recruitment	Managing Recruitment - Defining Recruitment
Recruitment	Managing Recruitment - Assigning Recruitment
Recruitment	Managing Recruitment - Entering Recruitment
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Recruitment	Managing Recruitment - Assigning Recruitment
Recruitment	Managing Recruitment - Entering Recruitment
Recruitment	Managing Recruitment - Viewing Recruitment
Recruitment	Managing Recruitment - Defining Recruitment
Recruitment	Managing Recruitment - Assigning Recruitment
Recruitment	Managing Recruitment - Entering Recruitment
Recruitment	Managing Recruitment - Viewing Recruitment
Recruitment	Managing Recruitment - Defining Recruitment
Recruitment	Managing Recruitment - Assigning Recruitment
Recruitment	Managing Recruitment - Entering Recruitment
Recruitment	Managing Recruitment - Viewing Recruitment
Recruitment	Managing Recruitment - Defining Recruitment
Recruitment	

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

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



Why Partner with SpearMC for Managed Services?



FLEXIBLE CONTRACTS WITH ROLLOVER HOURS

Maximize budget each month, or put unused time toward a new strategic project.



RELIABLE SUPPORT FROM DOMESTIC RESOURCES

Count on dedicated onshore resources to respond to all requests.



COMPLETE VISIBILITY WITH MONTHLY REPORTING

See exactly what our team worked on and how much value we added.

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.

