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 **SMART ERP**
Solutions
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P-051597: Optimize Student and Employee Journeys with the power of Activity Guides

PeopleSoft

RECONNECT

DIVE DEEP - VIRTUAL!

PeopleSoft RECONNECT Dive Deep 2025

October 27 – 30, 2025

Meet SpearMC



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Management

Campus Solutions

Enterprise Performance
Management



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All-Access Learning Pass

Live Private Training

Oracle Guided Learning

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Grants Labor
Cost Distribution

OGI Starter Kit

PTF Testing Grounds



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PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud
Infrastructure

Cloud Learning
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Oracle Public Sector Addendum | Texas DIR | University of Texas System | E&I for Higher Education | CSU / Univ of CA / CCC | State of New York

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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

Activity Guides

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

✕ Exit

OnBoarding for USA



David Ho
Senior Financial Analyst

◀ Previous

Complete

Ethnic Groups
○ Not Started

Documents
○ Not Started

Attachments
○ Not Started

Personal Details
○ Not Started

Talent Profile
○ Not Started

Benefits
○ Not Started

Payroll
○ Not Started

Summary
● Visited

Summary

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

Steps

25 rows

Step	Status	Date Completed	Required	Due Date	Mark Complete	Go to Step
Before You Start	✔ Complete	04/06/2020	No		Completed	Go to Step
Welcome	✔ Complete	04/06/2020	No		Completed	Go to Step
I-9	⚠ Overdue		Yes	06/01/2017	Mark Complete	Go to Step
Disability	● Visited		No		Mark Complete	Go to Step
Veteran Status	○ Not Started		No		Mark Complete	Go to Step
Ethnic Groups	○ Not Started		No		Mark Complete	Go to Step
Documents	○ Not Started		No		Mark Complete	Go to Step

Activity Guides

HCM - Fluid

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

FSCM - Fluid

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

Activity Guides

Campus Solutions - Fluid

- Global Chatbot Configuration
- Questionnaire Framework
- Registration

Campus Solutions - Classic

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

Custom Use case – Annual Policy Acknowledgement

✕ Exit

Employee Acknowledgement

Next >

1

Mission and Statement of Faith
Complete

2

Working Well Employee Handbook
Complete

EXPECTATIONS FOR MINISTRY EMPLOYMENT
As an employee of

Acknowledgement Details
User ID Name
Date/Time Stamp 03/04/2022 1:12:47PM

Use Case – Return to office survey

Exit

Covid 19 Return to Work

Mark Complete

Next >

1 Covid19 Survey Visited

2 Acknowledgement Visited

3 Attachments Visited

Step 1 of 3: Covid19 Survey

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

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

☐ Very Comfortable

☒ Somewhat Comfortable

☐ Somewhat Uncomfortable

☐ Very Uncomfortable

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

☒ Decreased Flexibility to work from home

☐ Getting exposed to Coronavirus

☐ Leaving family members at home who need assistance

☐ Organizing Childcare

☐ Having family member who are vulnerable to exposure

☐ No specific concerns

☐ Other Concerns

Please specify

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

Save Answers

Exit

Covid 19 Return to Work

Mark Complete

< Previous

Next >

1 Covid19 Survey Visited

2 Acknowledgement Visited

3 Attachments Visited

Step 2 of 3: Acknowledgement

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

[Covid19 Symptoms](#)

☐ I Agree

Save

Custom Use case

✕ Exit

Demo Student Guided Process

LBALASUBRAMANIAM

Mark Complete

< Previous

Next >

Submit

1>Welcome Video
Visited

2|Policy Acknowledgement
Visited

3|Emergency Contact
Not Started

4|My Contact Details
Not Started

5|Student Survey
Not Started

6|Summary
Not Started

Step 2 of 6: Policy Acknowledgement

Save

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

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

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

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

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

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

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

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

[Terms and Conditions](#)

☐ I Agree to the terms outlined above

Activity Guide Demo

Activity Guide Features

Peoplesoft and non-Peoplesoft content as steps

Support for Videos, Images and rich HTML content

Document management framework

Policy Acknowledgements

Questionnaire surveys

Multi-user guides

Due dates and dependency management

Email Notifications

Automated template assignment rules

Activity Guide Composer Framework

AG Category

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

AG Templates

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

AG Notifications

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

AG Template Assignment

- Configuration to automate template assignment based on business rules

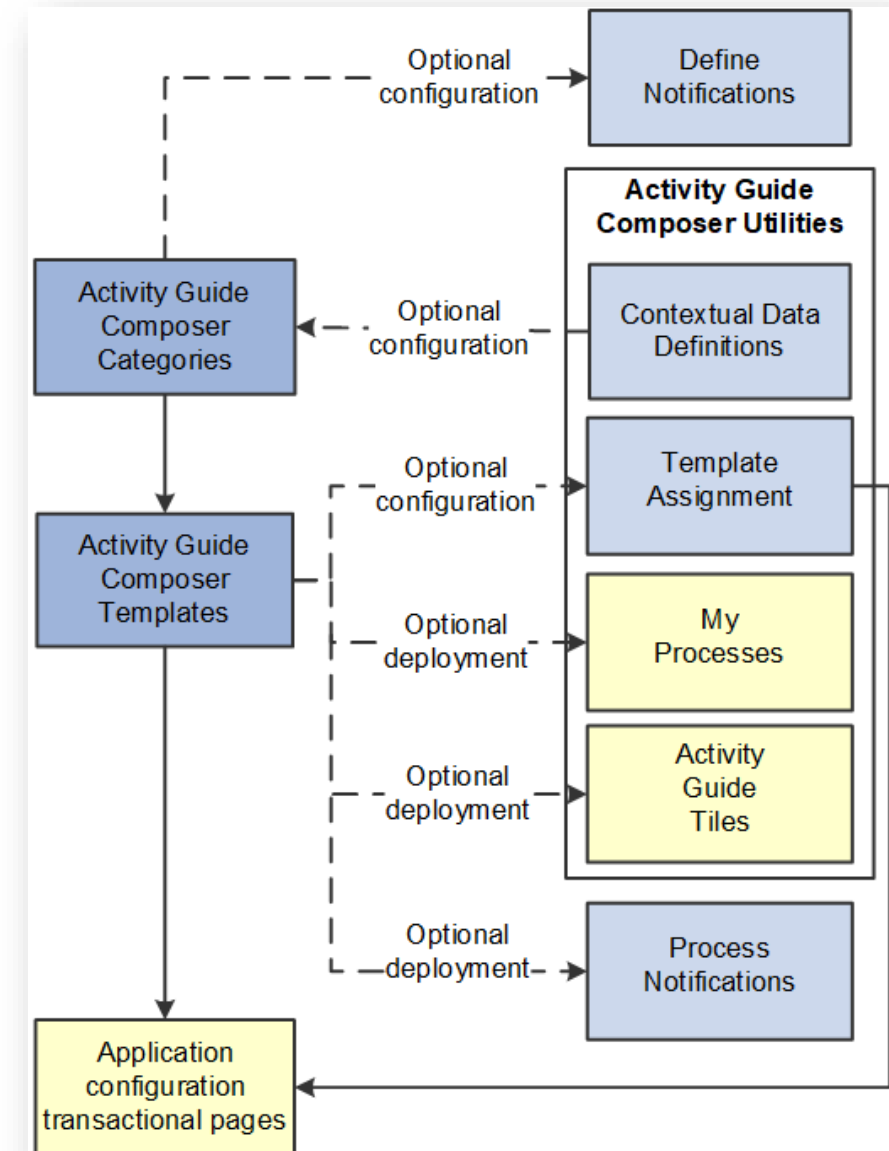
AG Instance Management

- Monitor and administer individual Activity Guide instances

Activity Guide Framework

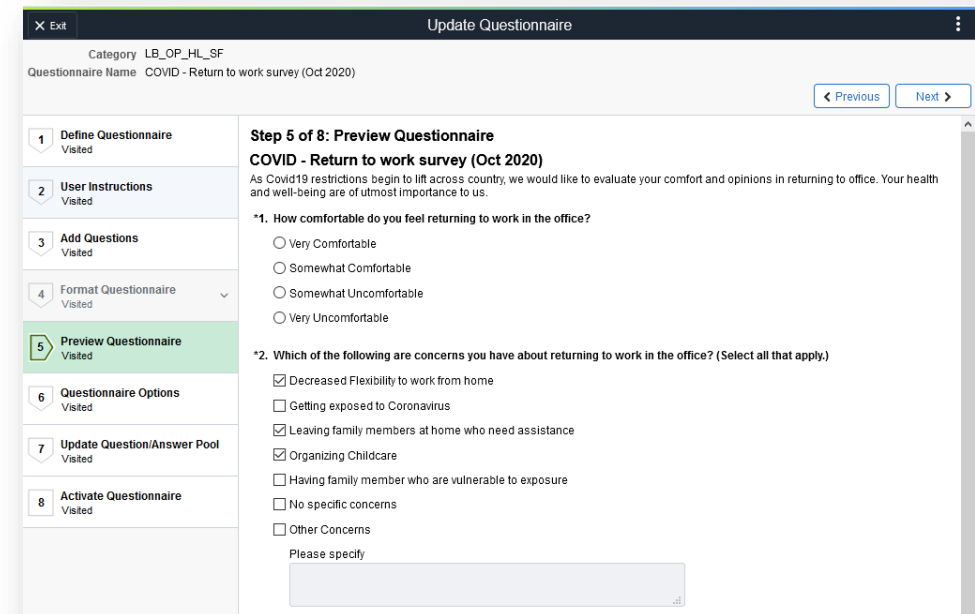
- Comprehensive Framework to simplify and streamline processes
- Predominantly configuration driven, while initial setup requires technical work
- Multiple business processes delivered using Activity Guides – Onboarding, Offboarding, Life Events, Open Enrollment, Job Application
- Core component of modernization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

Understanding Activity Guides



Questionnaire Framework

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



The screenshot shows the 'Update Questionnaire' interface. On the left is a sidebar with a list of steps: 1. Define Questionnaire, 2. User Instructions, 3. Add Questions, 4. Format Questionnaire, 5. Preview Questionnaire (highlighted), 6. Questionnaire Options, 7. Update Question/Answer Pool, and 8. Activate Questionnaire. The main area displays 'Step 5 of 8: Preview Questionnaire' for the survey 'COVID - Return to work survey (Oct 2020)'. It includes an introduction about evaluating comfort and opinions on returning to office. Two questions are shown: Question 1 asks about comfort levels with radio button options (Very Comfortable, Somewhat Comfortable, Somewhat Uncomfortable, Very Uncomfortable). Question 2 asks for concerns with checkboxes for 'Decreased Flexibility to work from home', 'Getting exposed to Coronavirus', 'Leaving family members at home who need assistance', and 'Organizing Childcare'. Other options include 'Having family member who are vulnerable to exposure', 'No specific concerns', and 'Other Concerns'. A text box for 'Please specify' is provided at the bottom.

Understanding Questionnaire Framework

Acknowledgement Framework

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

Acknowledgement Configuration

Acknowledgement ID LBCVD

Acknowledgement Details

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

*Description Covid19 Free Acknowledgement Short Description CovidFree

Long Description Covid19 Free Acknowledgement for return to work

*Category LB_OHS Operational Health and Safety

Acknowledgement Fields

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

Audit Trail Details

*Section Header Audit Details

Audit Trail Fields

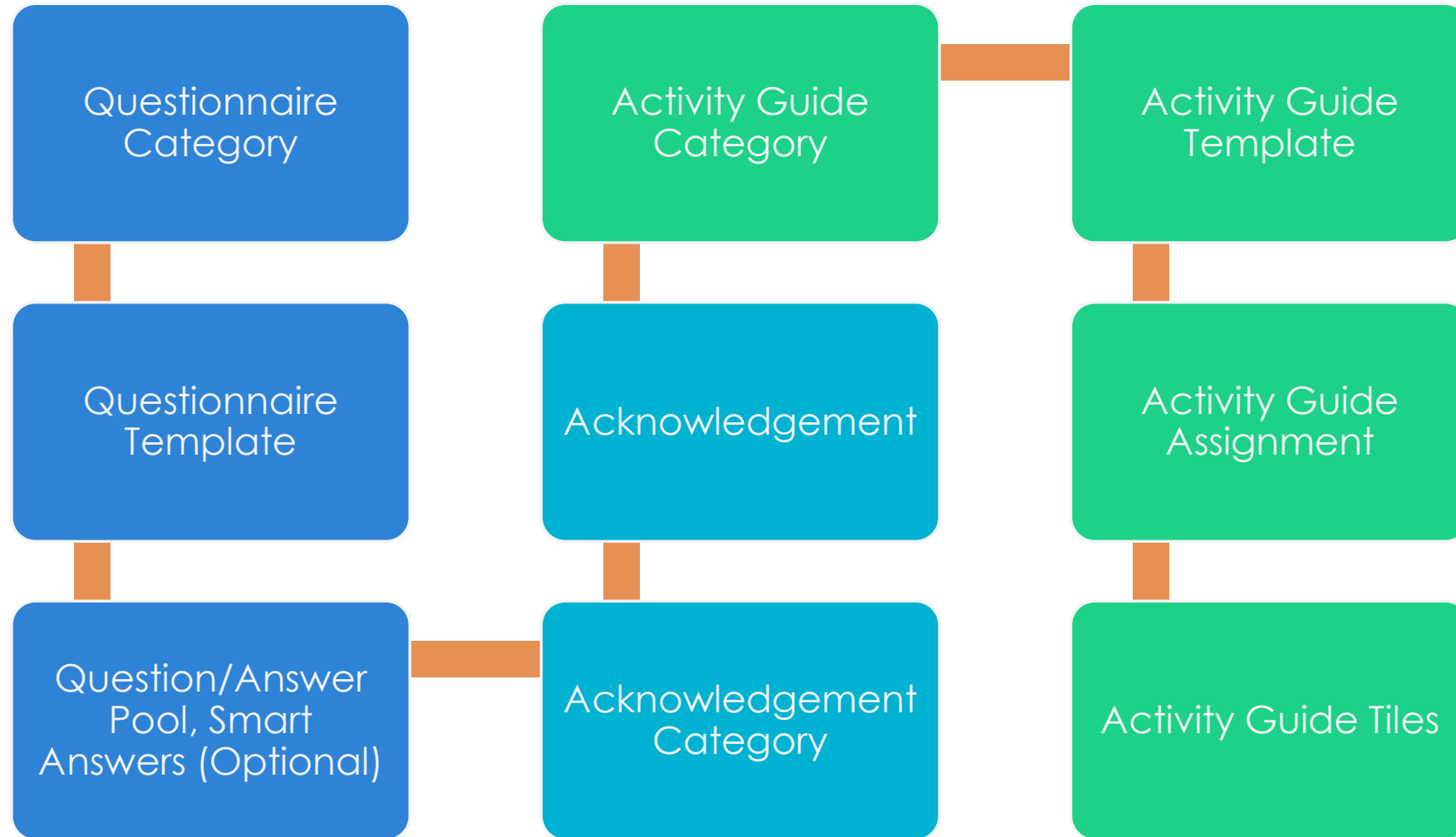
Field Name	Field Label	Enable	Display
USER_ID	User ID	☒	☒
DTTM_STAMP	Date/Time Stamp	☒	☒
IP_ADDRESS	IP Address	☐	☐

Verify Identity

☐ Enable Verify Identity

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

Deployment Process



Activity Guide - Resources

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



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Session ID:

051597



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PeopleSoft
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Click on the session rating form
link located in the chat box to
complete a brief survey

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Appendix

PeopleSoft

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PeopleSoft RECONNECT Dive Deep 2025

October 27 – 30, 2025

Date	Time (ET)	Session Title	Presenters	Session #
October 28	1:45 PM	Training, Policy Management and Change Management Made Easy with Oracle Guided Learning	Cameron McClurg	P-051593
October 29	11:15 AM	Fluid Performance Management: Tips, Tricks & Best Practices	Logesh Balasubramaniam	P-051596
October 29	12:30 PM	From Data to Decisions: Making the Most of PeopleSoft HCM Insights	Gary Dranikoski Logesh Balasubramaniam	P-051843
October 29	1:45 PM	AI-Powered Cloud: What's New in Oracle OCI and PeopleSoft	Joe Finlinson Cameron McClurg	P-051594
October 29	1:45 PM	Optimize Student and Employee Journeys with the power of Activity Guides	Logesh Balasubramaniam	P-051597
October 30	1:45 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randall Johnson Gary Dranikoski	P-051437
October 30	1:45 PM	PeopleSoft vs. Oracle Fusion Cloud: A Side-by-Side Look at Grants Management	Jessica Mann	P-051824

November 2025 Class Schedule

Date	Session
Nov 3	<u>PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions</u>
Nov 4	<u>PeopleSoft 9.2 Query Advanced for Campus Solutions</u>

January 2026 Class Schedule

Date	Session
Jan 7	<u>PeopleSoft 9.2 Query Basic & Intermediate for FSCM</u>
Jan 8	<u>PeopleSoft 9.2 Query Advanced for FSCM</u>
Jan 13-15	<u>PeopleTools I & II Accelerated</u>
Jan 20-21	<u>PeopleCode I & II Accelerated</u>
Jan 28-29	<u>PeopleSoft Insights with OpenSearch Technologies</u>

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February 2026 Class Schedule

Date	Session
Feb 2-3	<u>PeopleTools – Application Engine</u>
Feb 9	<u>PeopleSoft 9.2 Query Basic & Intermediate for HCM</u>
Feb 10	<u>PeopleSoft 9.2 Query Advanced for HCM</u>
Feb 10	<u>HCM Bootcamp – Core HR</u>
Feb 11	<u>HCM Bootcamp – NA Payroll</u>
Feb 12	<u>HCM Bootcamp – Benefits Administration</u>
Feb 12-13	<u>Oracle SQL & SQR for PeopleSoft</u>
Feb 17	<u>PeopleSoft Maintenance Tools & Strategies</u>
Feb 18-19	<u>PeopleTools Integration Broker Configure & Administer</u>

Visit our [website](#) for more information

March 2026 Class Schedule

Date	Session
Mar 3	PeopleTools – Activity Guides
Mar 5	PeopleTools Security (Functional) for FSCM & HCM
Mar 9-10	PeopleTools Security (Technical)
Mar 11-12	PeopleTools – Fluid UI Development
Mar 17-20	PeopleTools System Administration: Maintenance and Troubleshooting

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