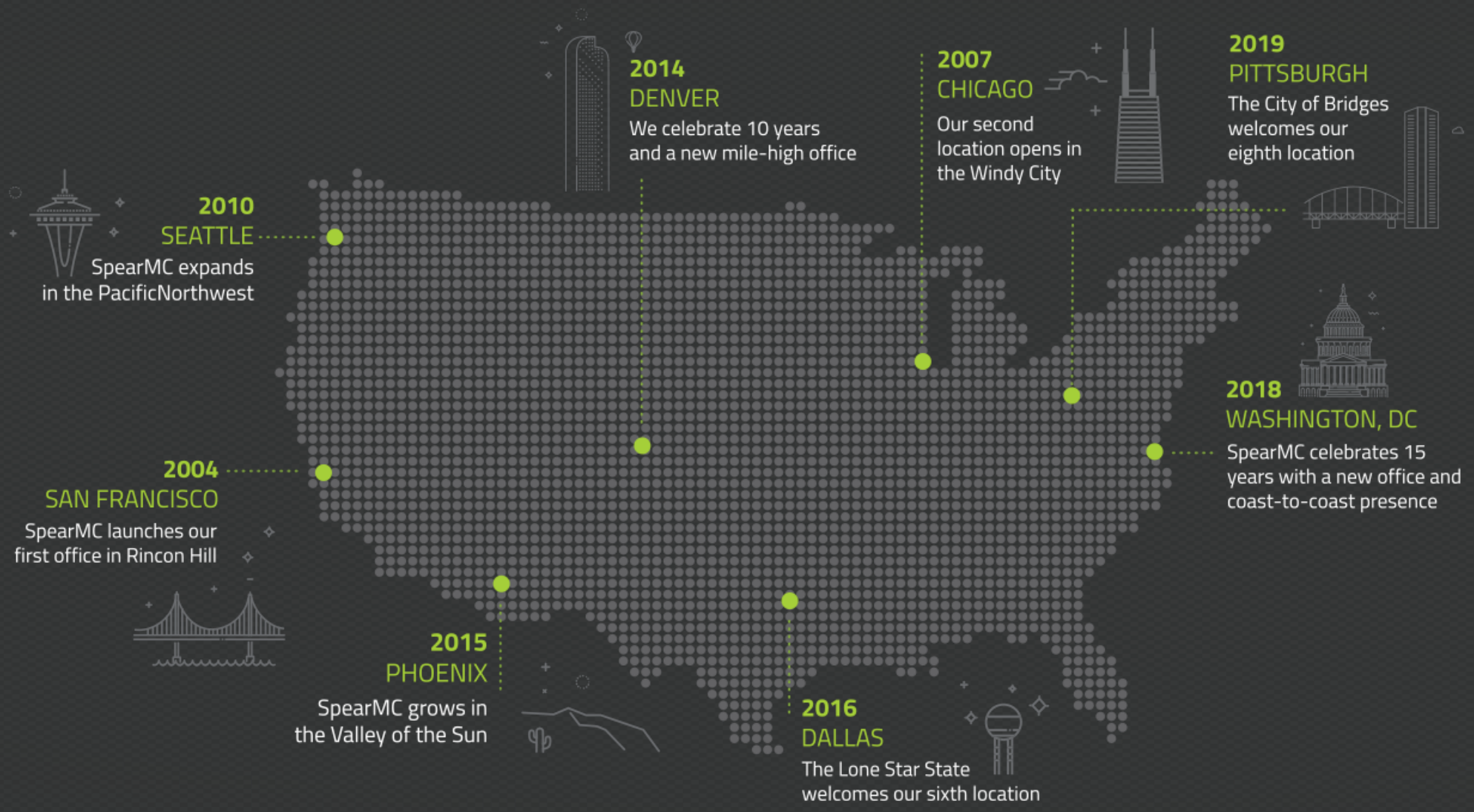
SpearMC
MANAGED SERVICES

Managed Services

PeopleSoft

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

Coast-to-coast Coverage



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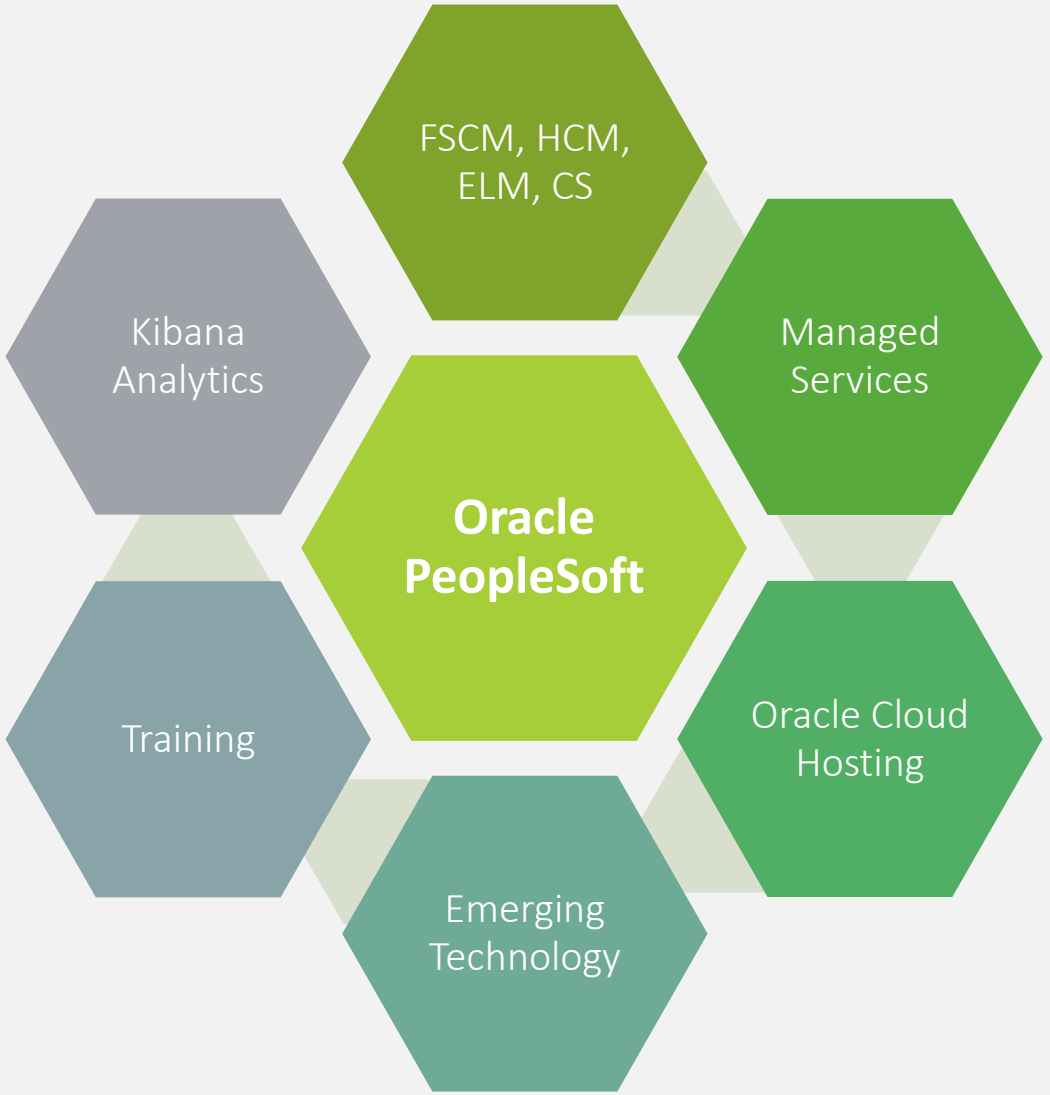
Our Services



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Gartner recognized. Oracle specialized.

SpearMC is the sole featured PeopleSoft vendor in the latest 2022 Gartner Market Guide for Oracle Professional Services. We invested heavily into PeopleSoft several years ago and went “all in” with our leading approach to Oracle Cloud Infrastructure.

READ MORE >

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Sampling of Managed Services Clients

SpearMC

Client Success Stories

VULCAN

SONANCE

city of north vancouver

HARKINS

First Financial Northwest Bank

BUSS

CARVANA

Ohio Department of Taxation

EvergreenHealth

Memorial

PARKVIEW HEALTH

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Managed Support Services

- **Technical Support Services:**
  - Support of PeopleSoft applications including maintenance and patching
    - Annual PeopleTools and PUM updates (Stay Current)
    - Adhoc PUM updates (Selective Adoption) as necessary
    - PeopleTools Patching
    - Application of quarterly Oracle Critical Patch Updates (CPUs)
    - Preventative maintenance (Audit Report Analysis and Troubleshooting)
    - Middleware Maintenance/Updates (Tuxedo, Web Logic, etc.)
    - Diagnosis/tuning of application performance issues/hung processes
    - Diagnosis/resolution of system related errors
    - Code Migrations between environments
  - PeopleSoft Environment Replication
    - Environment replication/refreshes
    - New Environment Setup
    - Identity Management Integrations
  - Database administration
    - Database upgrade/patching
    - Backup/Restore as Requested
    - Diagnosis/tuning of performance issues/hung processes
  - Regulatory and ad hoc PeopleSoft enhancements including:
    - Applying tax updates, 1099 updates
  - Cloud Infrastructure Sizing, Architecting and Planning
- **Development Support Services**
  - Delivery of individualized solutions including code modifications, interfaces and report writing
  - Break/Fix
  - Customization Retrofits
  - De-Customizations (Migrations to Isolated Code)
  - Bolt Ons
  - Documentation/Knowledge Transfer to CLIENT when appropriate
- **Functional Support Services:**
  - Tier 2/3 Support - Deep PeopleSoft Expertise
  - Tier 1 Help Desk Optional
  - Intake Customer Requests, Triage, Prioritization
  - Delivery of individualized solutions
  - Documentation of issues and resolutions
  - Training and Knowledge Transfer to Client
  - Ad-Hoc and Minor Project Work As-Requested
- **Account Management Services:**
  - Roadmap Services
  - PeopleSoft Demonstrations
  - Oracle Account Facilitation
  - Personnel Coordination/Oversight
- **Training Services:**
  - Complimentary All Access Learning Pass
  - Discounted Private and Public Training Classes

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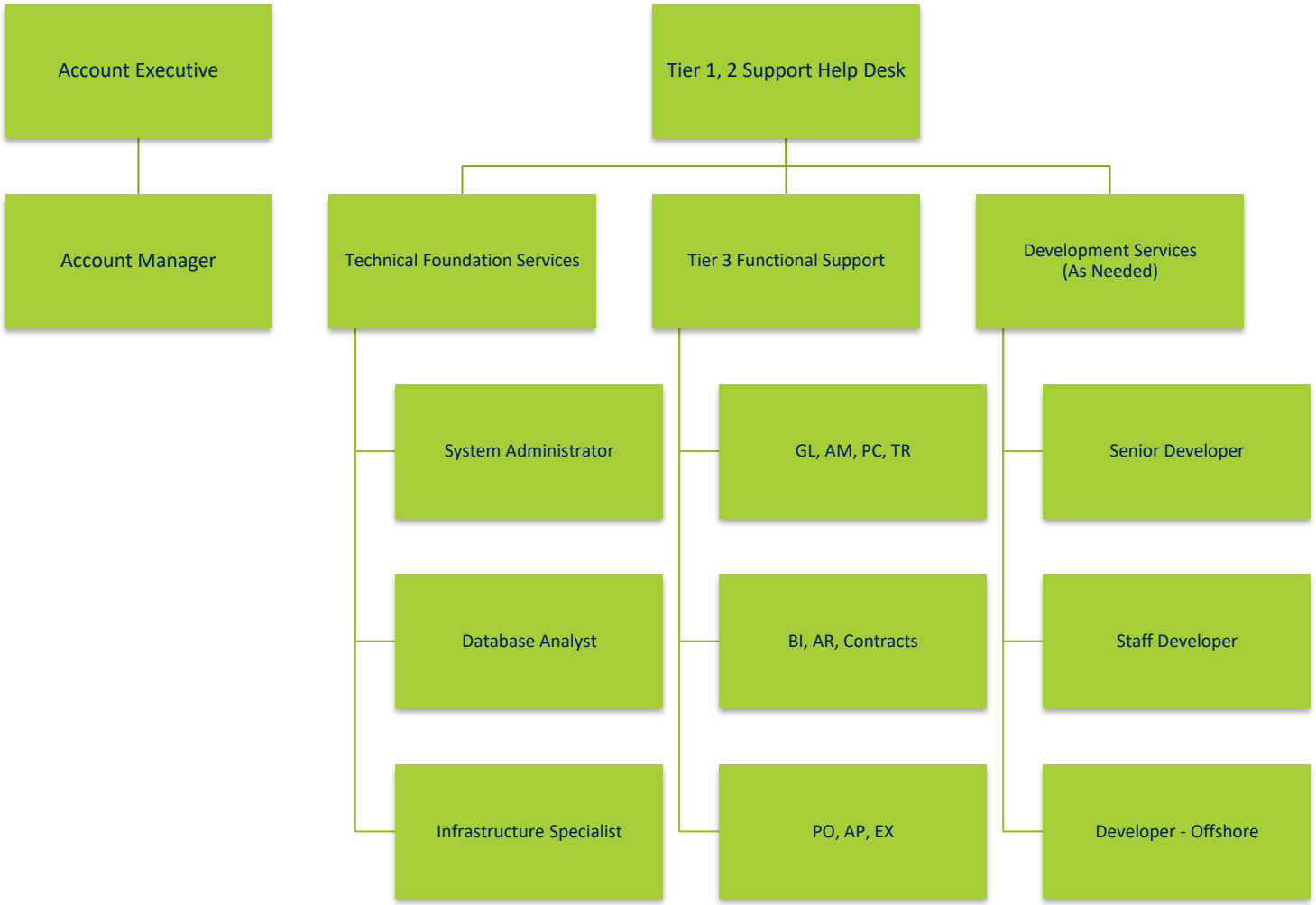
SpearMC Managed Services Delivery – Org Chart



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Transition to Managed Services

	Transition		Ongoing Service	
	1 Discovery	2 Operational Integration	3 Support	4 Evolve
Objective	This phase is a set of tasks designed to provide a "base of operations" for the team	This phase is where the team prepares to take over support	Daily support of Peoplesoft environments	Improve the overall PeopleSoft product including strategic projects, training and new functionality
Key Activities	• Access to the Environment • Discovery of the Environment • Gather / Create Documentation Inventory • Conducting Operational Meetings • Developing a Gap Analysis	• Business Process Shadowing Sessions • Technical Shadowing Sessions • System Admin Shadowing Sessions • Communication Protocols • Finalize Operational Rules	• Day to day support focused on break fixes and Issue Resolution • General maintenance and system monitoring • Knowledge sharing	• Get Current Updates/Upgrades • Reduce customizations • New Feature Implementation • Testing as a Service • Cloud shift • Oracle Guided Learning
Deliverables	• System Architecture (servers and integration points) • RICEW (Reports, Integrations, Conversions, Enhancements, Workflows) • Fit-Gap Plan	• Jira Service Desk Configuration & Roll-out • Operational Handbook • Functional & Technical Design Templates • Environment Migration Strategy	• Break fixes • Critical Patch Updates • Tax/1099 updates	• Roadmap

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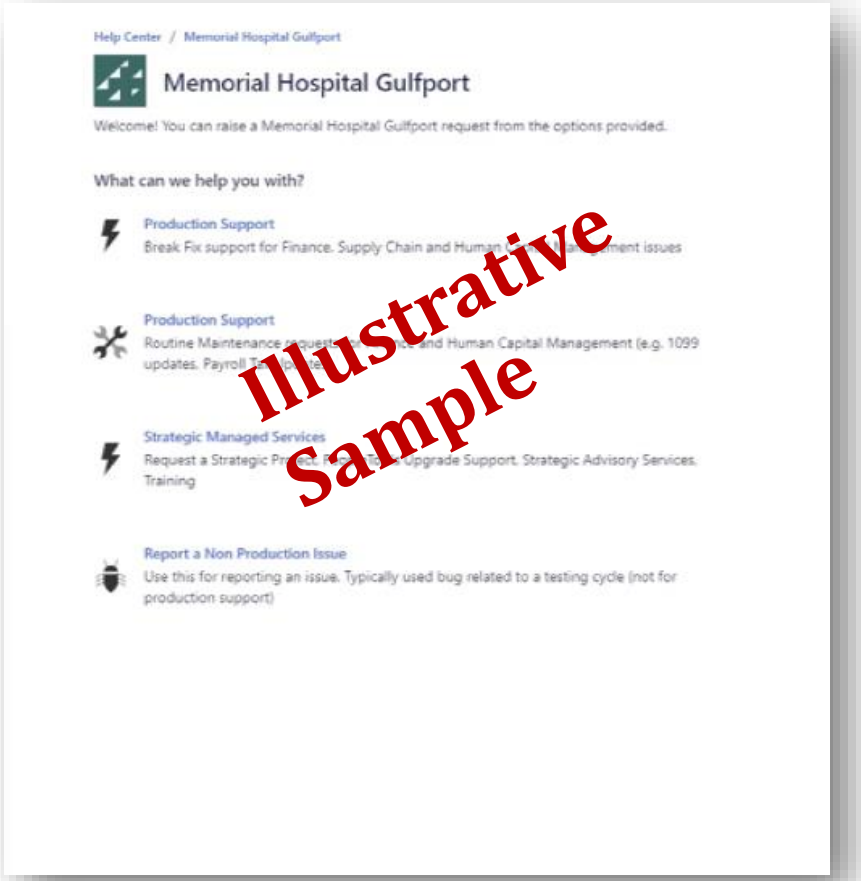
Support Help Desk Powered by Jira Service Desk

- Centralized Platform for Issue Management
- Communications protocol and schedule
- Process for prioritizing work
- Knowledge Base



Jira Service Desk

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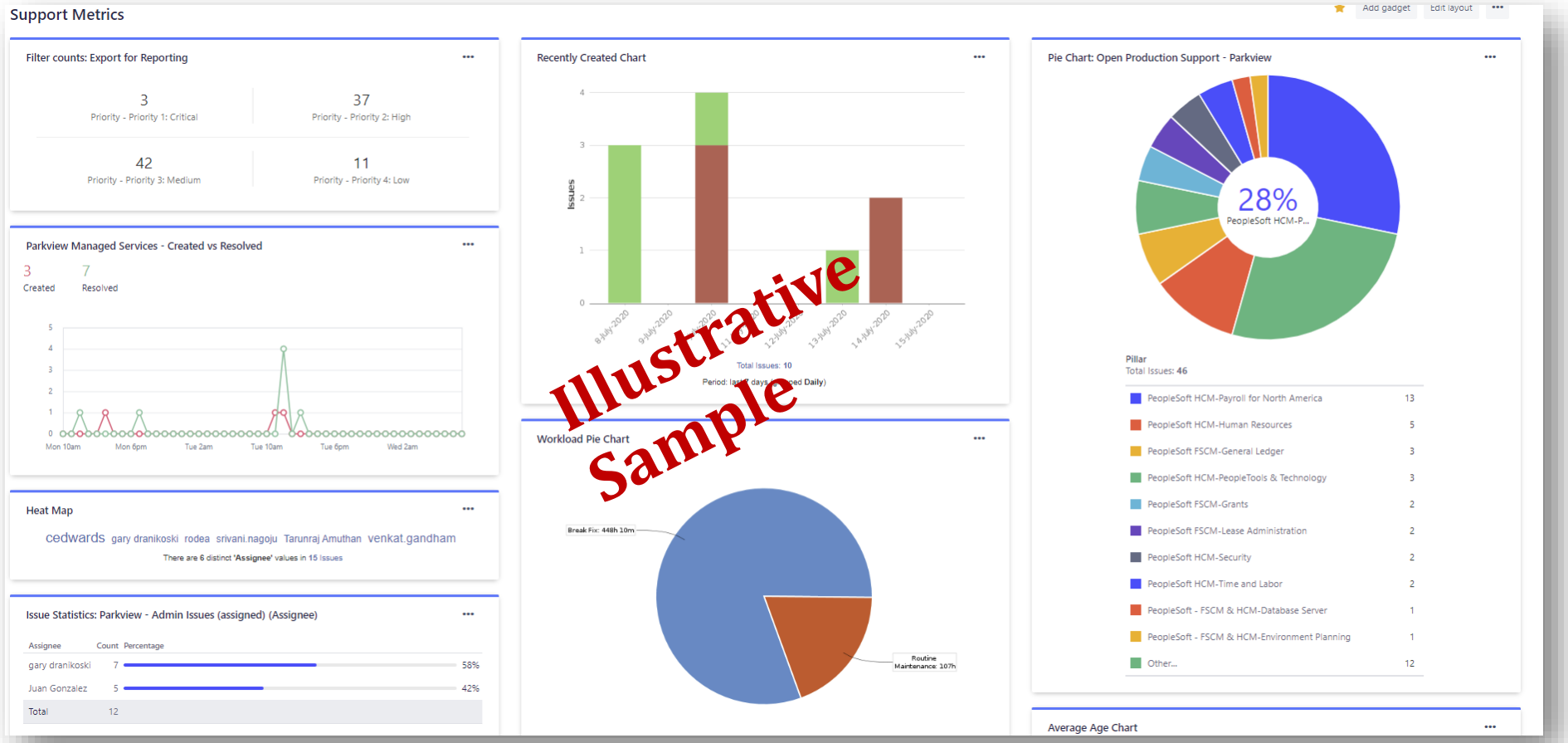
Support Help Desk Powered by Jira Service Desk



Jira Service Desk

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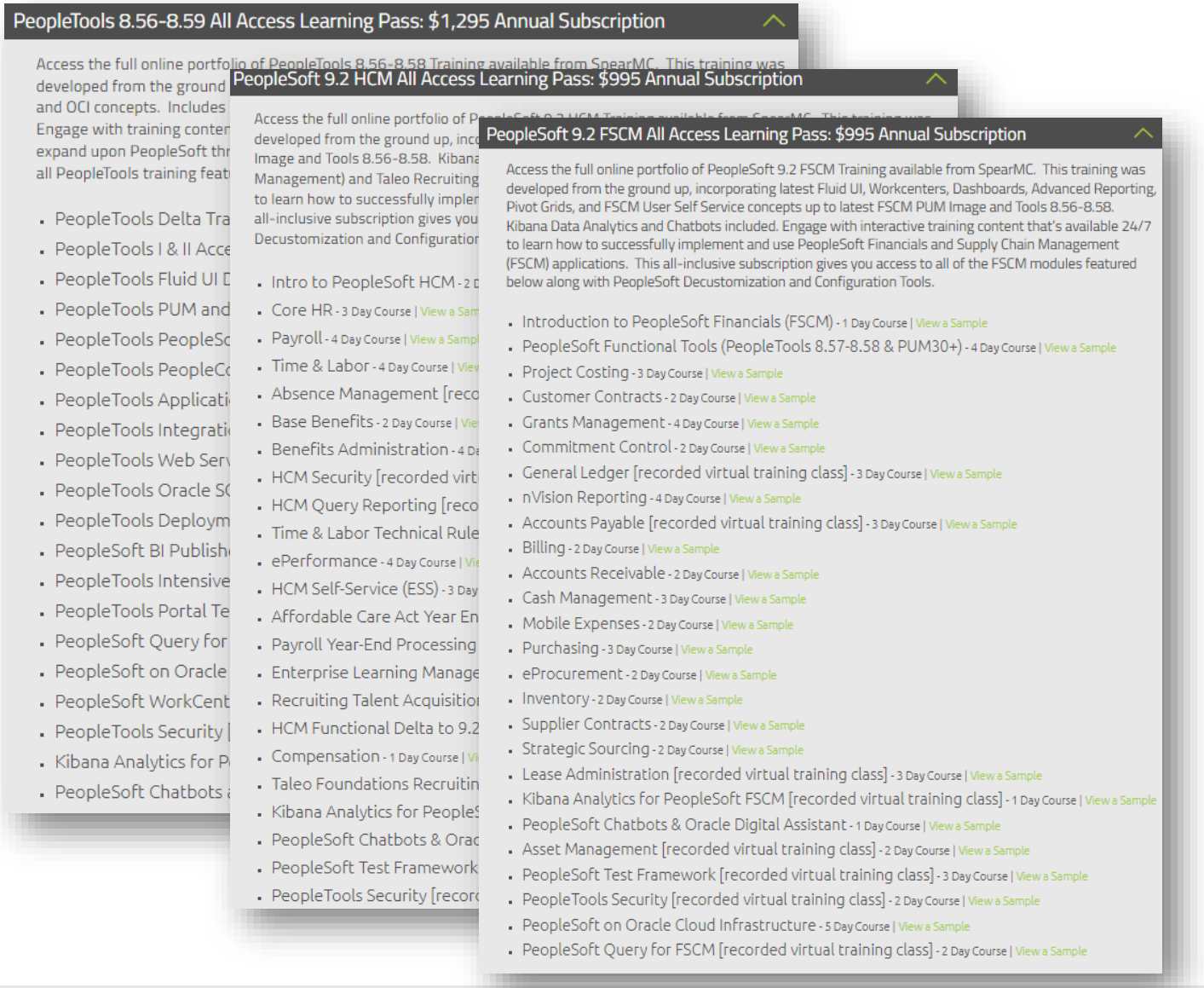
All Access Learning Pass

Our Managed Services Customers receive complimentary All-Access Learning Passes to supplement internal knowledge. Our Consultants are available for walk throughs of modules and DMO facilitation.



PeopleTools 8.56-8.59 All Access Learning Pass: $1,295 Annual Subscription

Access the full online portfolio of PeopleTools 8.56-8.58 Training available from SpearMC. This training was developed from the ground
and OCI concepts. Includes
Engage with training conten
expand upon PeopleSoft thr
all PeopleTools training feat

- PeopleTools Delta Tra
- PeopleTools I & II Acce
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- PeopleTools Oracle SC
- PeopleTools Deploym
- PeopleSoft BI Publish
- PeopleTools Intensive
- PeopleTools Portal Te
- PeopleSoft Query for
- PeopleSoft on Oracle
- PeopleSoft WorkCent
- PeopleTools Security
- Kibana Analytics for P
- PeopleSoft Chatbots

PeopleSoft 9.2 HCM All Access Learning Pass: $995 Annual Subscription

Access the full online portfolio of P
developed from the ground up, inc
Image and Tools 8.56-8.58. Kibana
Management) and Taleo Recruiting
to learn how to successfully impler
all-inclusive subscription gives you
Decustomization and Configuratior

- Intro to PeopleSoft HCM - 2 D
- Core HR - 3 Day Course | View a Sam
- Payroll - 4 Day Course | View a Sampl
- Time & Labor - 4 Day Course | Viev
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- Time & Labor Technical Rule
- ePerformance - 4 Day Course | Vie
- HCM Self-Service (ESS) - 3 Day
- Affordable Care Act Year En
- Payroll Year-End Processing
- Enterprise Learning Manage
- Recruiting Talent Acquisitio
- HCM Functional Delta to 9.2
- Compensation - 1 Day Course | Vi
- Taleo Foundations Recruitin
- Kibana Analytics for People
- PeopleSoft Chatbots & Orac
- PeopleSoft Test Framework
- PeopleTools Security [recor

PeopleSoft 9.2 FSCM All Access Learning Pass: $995 Annual Subscription

Access the full online portfolio of PeopleSoft 9.2 FSCM Training available from SpearMC. This training was developed from the ground up, incorporating latest Fluid UI, Workcenters, Dashboards, Advanced Reporting, Pivot Grids, and FSCM User Self Service concepts up to latest FSCM PUM Image and Tools 8.56-8.58. Kibana Data Analytics and Chatbots included. Engage with interactive training content that's available 24/7 to learn how to successfully implement and use PeopleSoft Financials and Supply Chain Management (FSCM) applications. This all-inclusive subscription gives you access to all of the FSCM modules featured below along with PeopleSoft Decustomization and Configuration Tools.

- Introduction to PeopleSoft Financials (FSCM) - 1 Day Course | View a Sample
- PeopleSoft Functional Tools (PeopleTools 8.57-8.58 & PUM30+) - 4 Day Course | View a Sample
- Project Costing - 3 Day Course | View a Sample
- Customer Contracts - 2 Day Course | View a Sample
- Grants Management - 4 Day Course | View a Sample
- Commitment Control - 2 Day Course | View a Sample
- General Ledger [recorded virtual training class] - 3 Day Course | View a Sample
- nVision Reporting - 4 Day Course | View a Sample
- Accounts Payable [recorded virtual training class] - 3 Day Course | View a Sample
- Billing - 2 Day Course | View a Sample
- Accounts Receivable - 2 Day Course | View a Sample
- Cash Management - 3 Day Course | View a Sample
- Mobile Expenses - 2 Day Course | View a Sample
- Purchasing - 3 Day Course | View a Sample
- eProcurement - 2 Day Course | View a Sample
- Inventory - 2 Day Course | View a Sample
- Supplier Contracts - 2 Day Course | View a Sample
- Strategic Sourcing - 2 Day Course | View a Sample
- Lease Administration [recorded virtual training class] - 3 Day Course | View a Sample
- Kibana Analytics for PeopleSoft FSCM [recorded virtual training class] - 1 Day Course | View a Sample
- PeopleSoft Chatbots & Oracle Digital Assistant - 1 Day Course | View a Sample
- Asset Management [recorded virtual training class] - 2 Day Course | View a Sample
- PeopleSoft Test Framework [recorded virtual training class] - 3 Day Course | View a Sample
- PeopleTools Security [recorded virtual training class] - 2 Day Course | View a Sample
- PeopleSoft on Oracle Cloud Infrastructure - 5 Day Course | View a Sample
- PeopleSoft Query for FSCM [recorded virtual training class] - 2 Day Course | View a Sample

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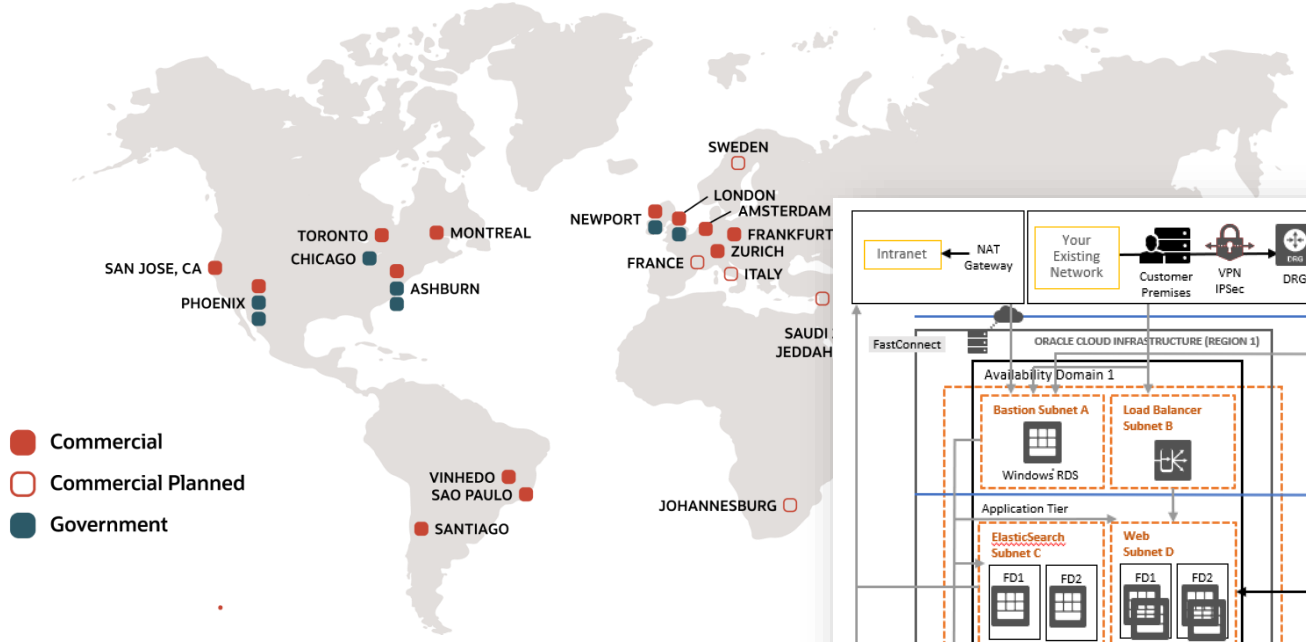
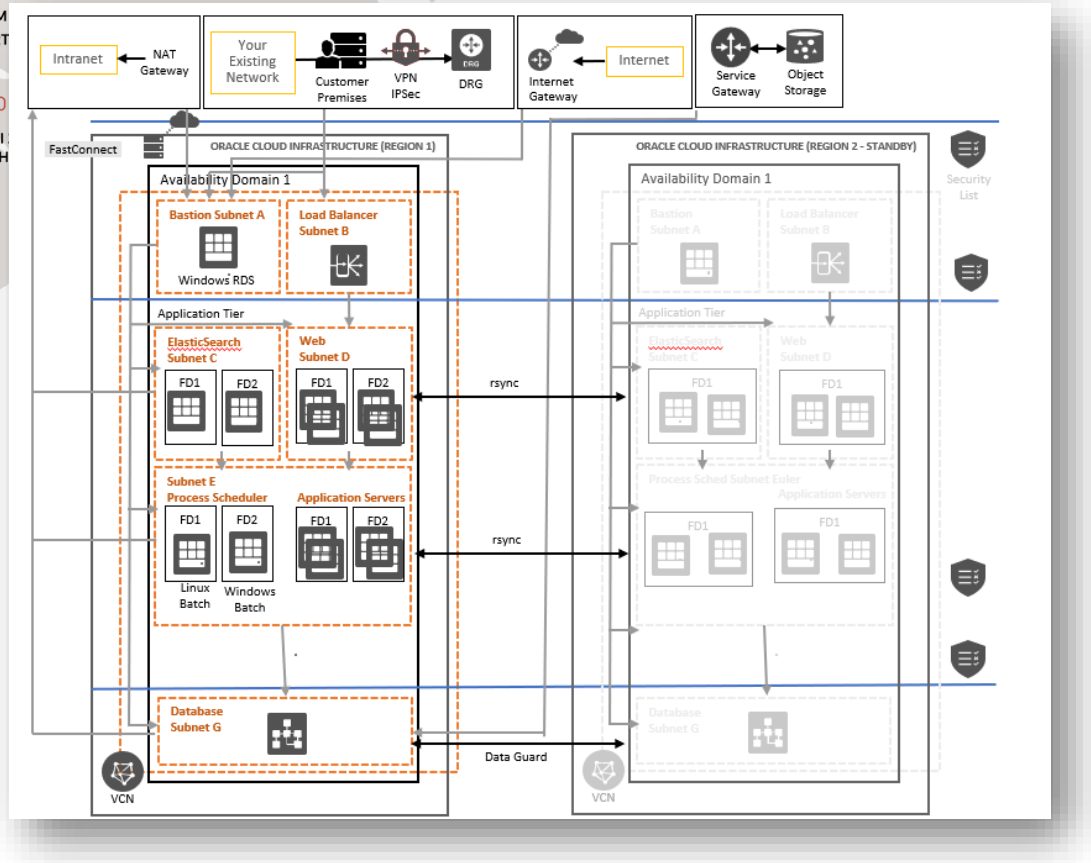
Cloud Infrastructure Sizing and Architecting





Our Cloud Architects will evaluate your on-prem footprint and provide a cloud infrastructure sizing, architecture plan and cost estimation. If desired, we will work with Oracle reps to generate formal quotes for infrastructure costs and migration services.

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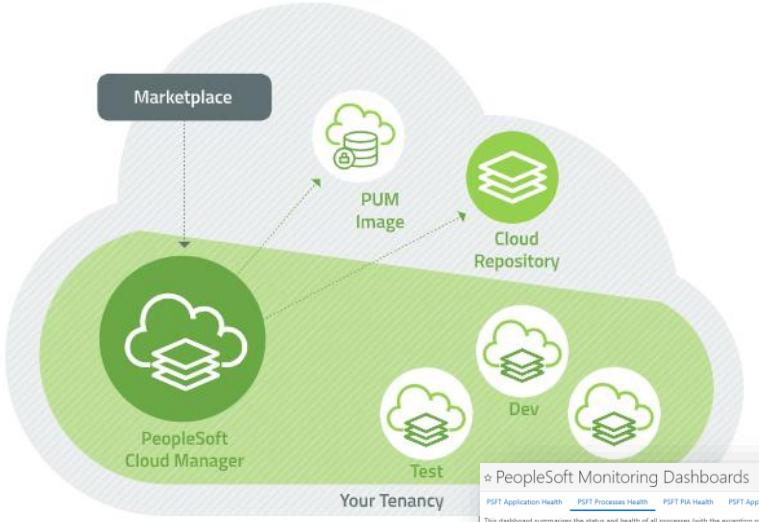
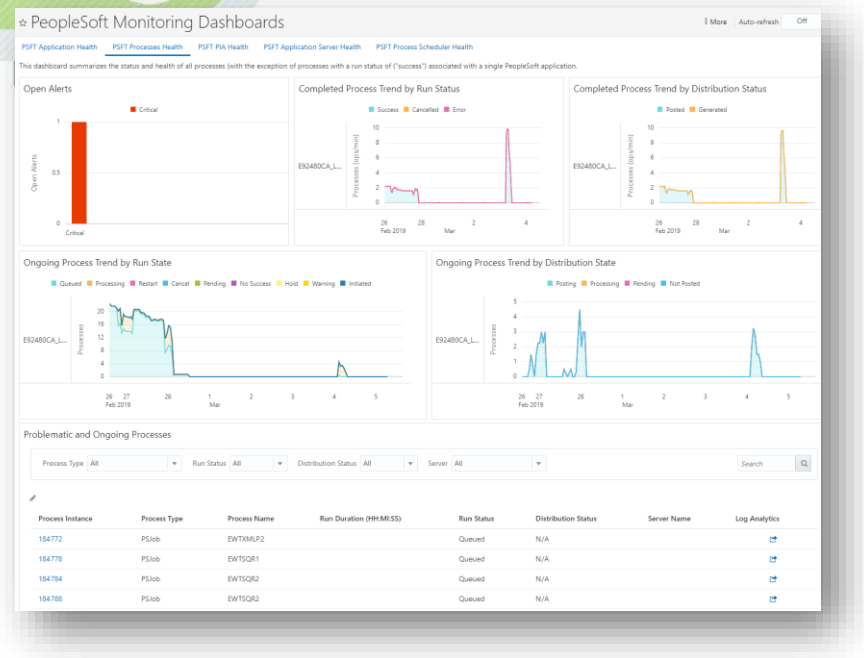
Oracle Cloud Infrastructure Benefits

Oracle Cloud Infrastructure provides key benefits to PeopleSoft customers by providing *Automation* to routine PeopleSoft System Lifecycle Management tasks such as:

- Automated Tools Patching
- Uptime/Downtime Schedule
- Automated Scaling/Performance Management
- Backups/Restores
- Security Monitoring and Preventative Threat Detection





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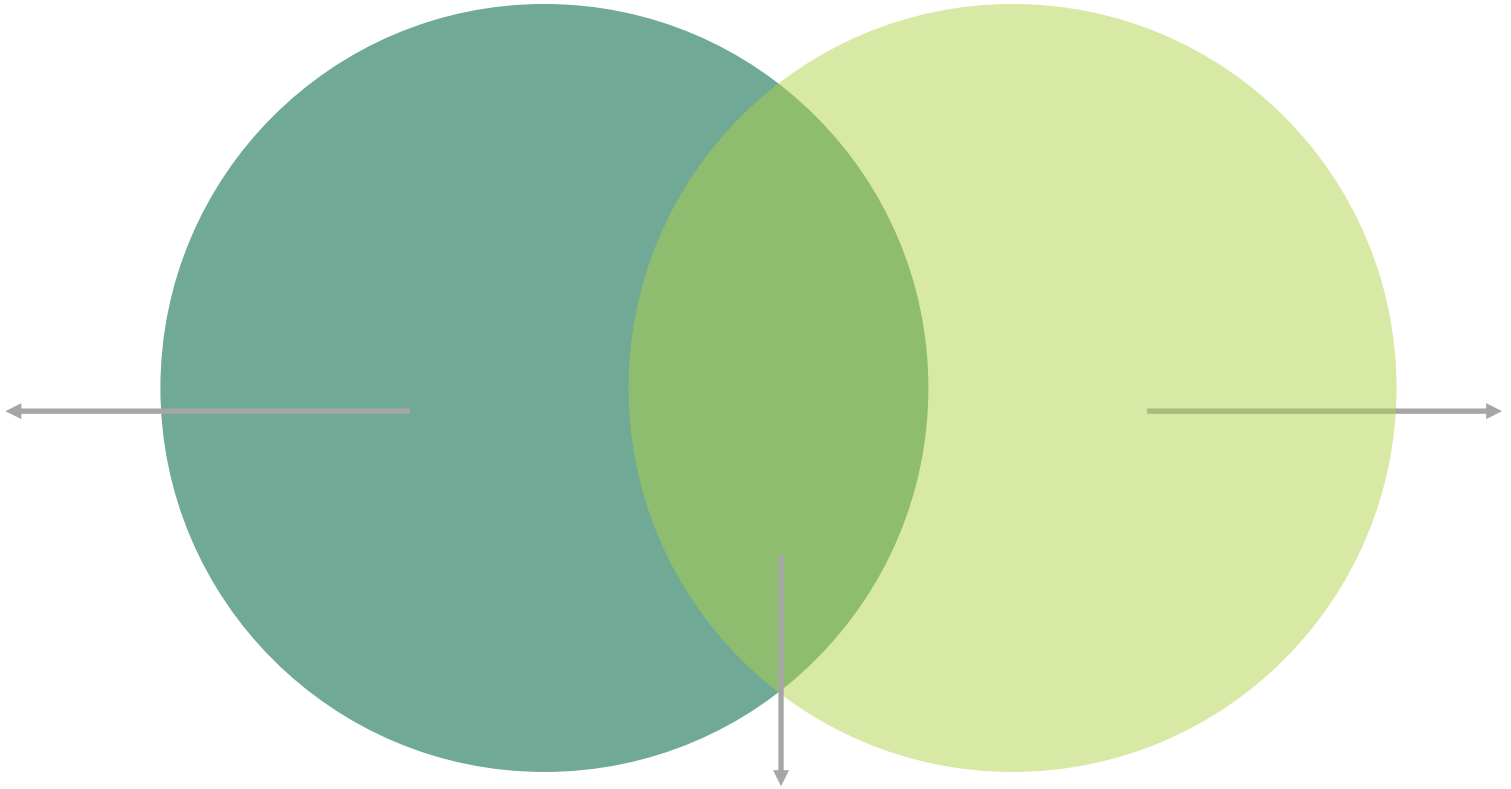
T&M Support vs. Managed Services

SpearMC

Rate Card

- Standard (Higher) Rates
- Variable hours
- Named Resources (Support Pending Availability)
- No SLA



Fixed Managed Services

- Full-Service Account Management
- Lower Average Rate
- Sized for Need
- Named Resources
- Additional Capacity and Skillsets via Pooled Resources
- All Access Learning Pass
- SLA

SpearMC Standards

- Senior PeopleSoft Resources
- Training Resources Available
- Latest and Greatest DMO powered by OCI
- Documentation and Knowledge Transfer Standards

Jira Service Desk

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Case Study: Parkview Health

Parkview Health was looking for

- PeopleSoft experience and a track record supporting other Healthcare organizations
- Cost effective contract with flexibility
- Fresh approach to Support - more than technical break fixes
- Tools, processes and other services including
  - Integrated processes
  - Extensive knowledge transfer
  - Modern helpdesk software

PeopleSoft application support and more

Full suite of managed services including Operational Application Support (Technical and Functional), PeopleSoft Test Framework, Testing as a Service and OCI tenancy, plus special projects such as Segregation of Duties Remediation, Grants Reimplementation, ePerformance Notification Framework

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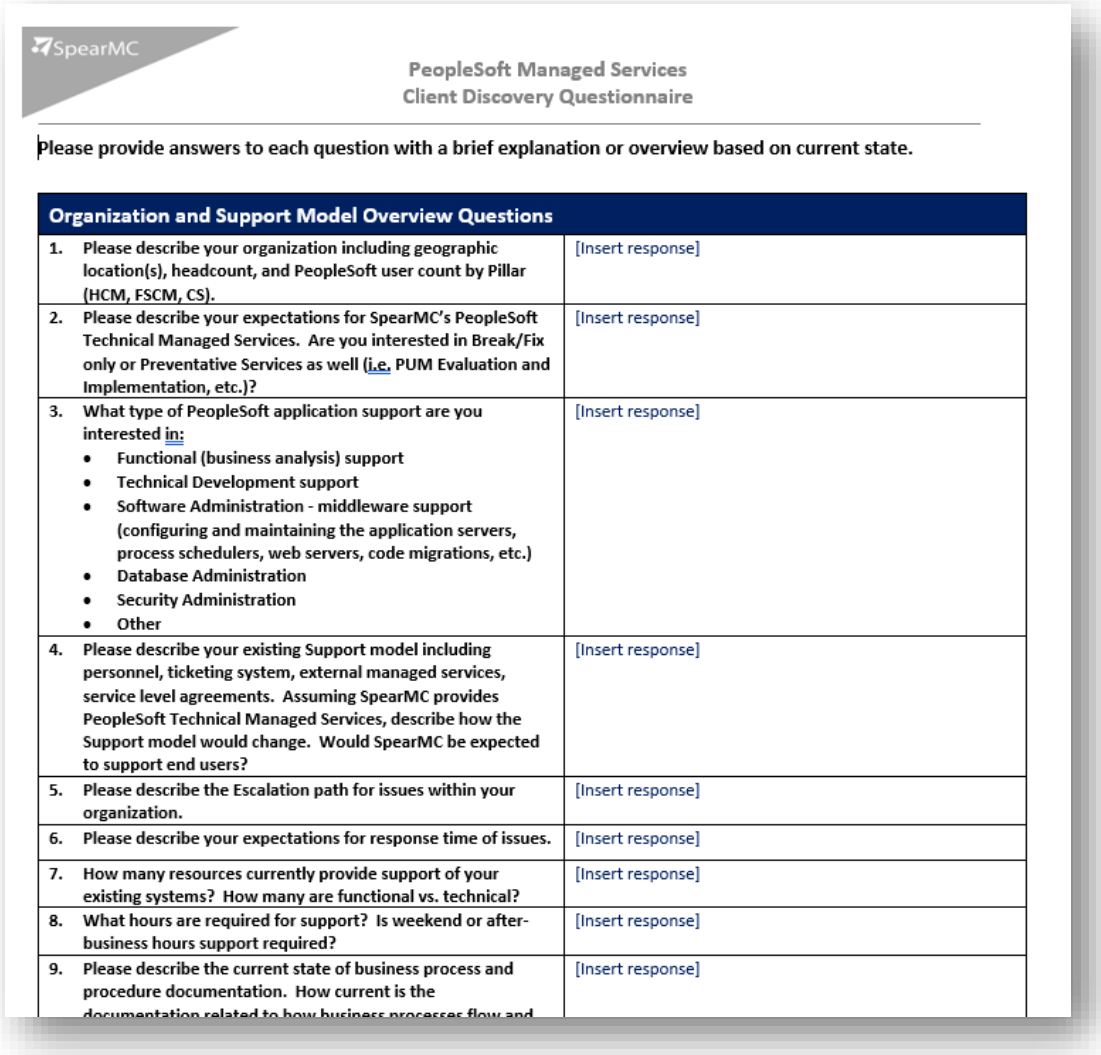
Next Steps - Questionnaire

Our Managed Services Discovery Questionnaire is designed to provide our clients an opportunity to evaluate the current footprint of support personnel, needs, capabilities and constraints. From this exercise, we will work with you to determine a "right size" of a team of PeopleSoft Support Consultants to supplement your internal capabilities and further empower your personnel.



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PeopleSoft Managed Services
Client Discovery Questionnaire

Please provide answers to each question with a brief explanation or overview based on current state.

Organization and Support Model Overview Questions	
1. Please describe your organization including geographic location(s), headcount, and PeopleSoft user count by Pillar (HCM, FSCM, CS).	[Insert response]
2. Please describe your expectations for SpearMC's PeopleSoft Technical Managed Services. Are you interested in Break/Fix only or Preventative Services as well (i.e. PUM Evaluation and Implementation, etc.)?	[Insert response]
3. What type of PeopleSoft application support are you interested in: • Functional (business analysis) support • Technical Development support • Software Administration - middleware support (configuring and maintaining the application servers, process schedulers, web servers, code migrations, etc.) • Database Administration • Security Administration • Other	[Insert response]
4. Please describe your existing Support model including personnel, ticketing system, external managed services, service level agreements. Assuming SpearMC provides PeopleSoft Technical Managed Services, describe how the Support model would change. Would SpearMC be expected to support end users?	[Insert response]
5. Please describe the Escalation path for issues within your organization.	[Insert response]
6. Please describe your expectations for response time of issues.	[Insert response]
7. How many resources currently provide support of your existing systems? How many are functional vs. technical?	[Insert response]
8. What hours are required for support? Is weekend or after-business hours support required?	[Insert response]
9. Please describe the current state of business process and procedure documentation. How current is the documentation related to how business processes flow and	[Insert response]

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