

Taking PeopleSoft Chatbots to the Next Level with **Oracle Guided Learning**

An Overview of Integration, Benefits, and Use Cases

Meet SpearMC



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Meet SpearMC



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

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Expertise in
Oracle EPM Cloud
in North America

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Education
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Gartner.
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October 28 – 31, 2024

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

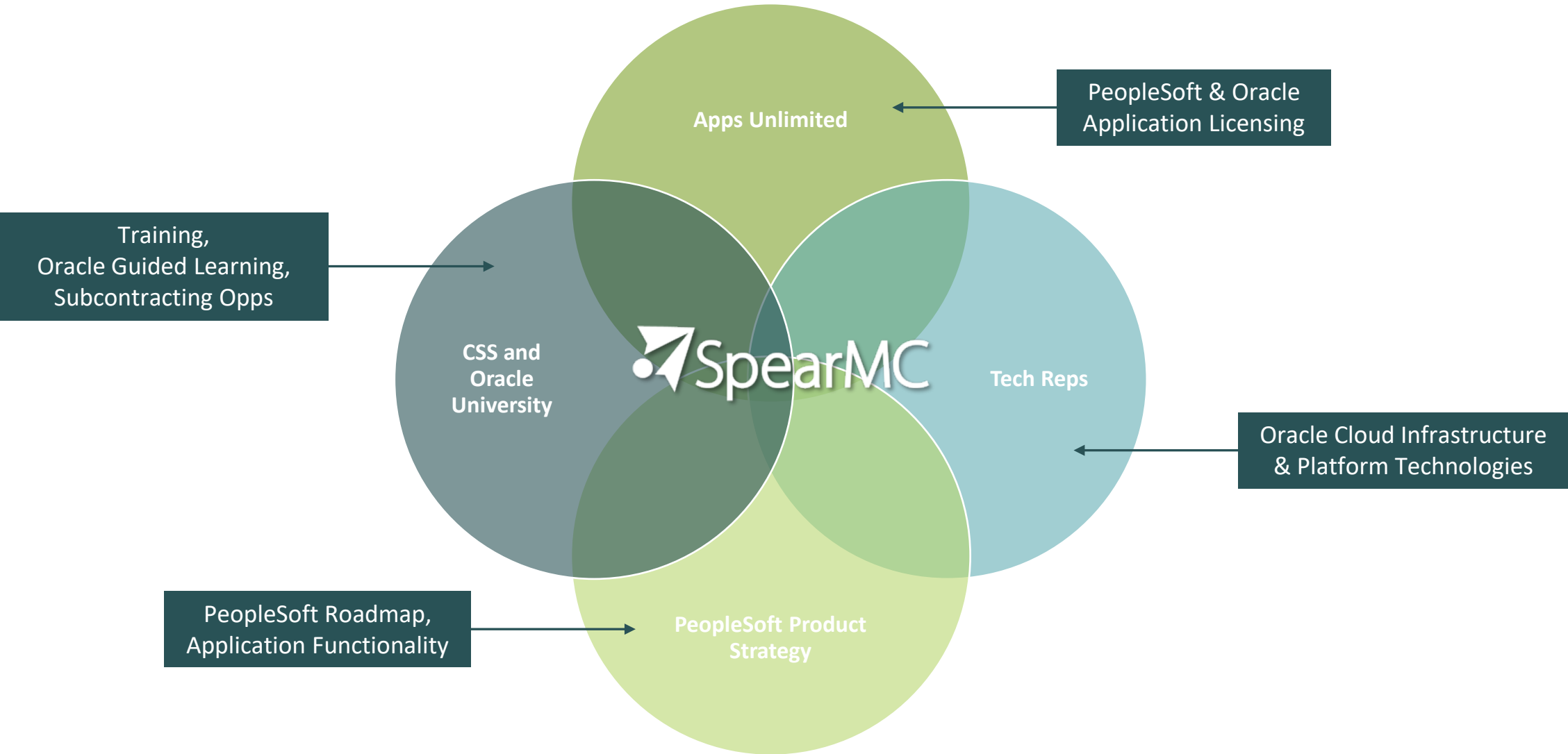


Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest Gartner Market Guide for Oracle Professional Services.



Products and Services

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Oracle Assessment
Chatbots & Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

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

Learn from an Oracle University Partner

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You will receive Powerful, Practical Learning Experiences covering PeopleSoft Campus Solutions, Human Capital Management, Financials and PeopleTools:

- Campus Solutions: Advisement, Admissions, Registration, 3C's
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- PeopleTools: Fluid Development, and Integration Broker/REST Web Services
- Reporting: OpenSearch Dashboards (formerly Kibana) and Query

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



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Agenda

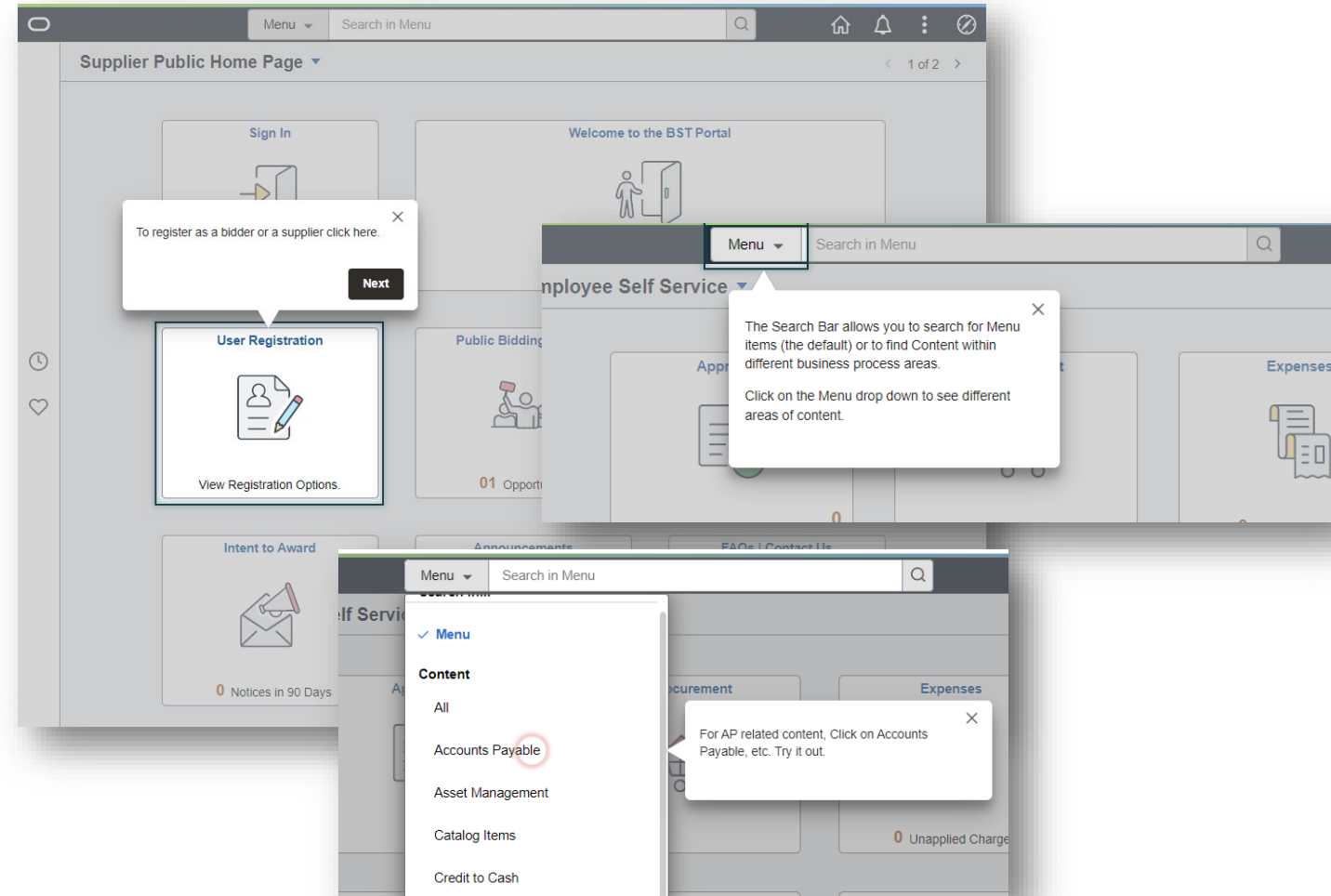
- Overview Of Oracle Guided Learning
- Overview Of Oracle Chatbots
- Potential Synergies Between OGL And Chatbots
- Possible Use Cases And Approaches
- Technical Integration Overview
- Conclusion & Next Steps

What is Oracle Guided Learning (OGL)

Help when you need it most. In-application guidance to accelerate adoption.

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**.
- 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 are Oracle Chatbots?

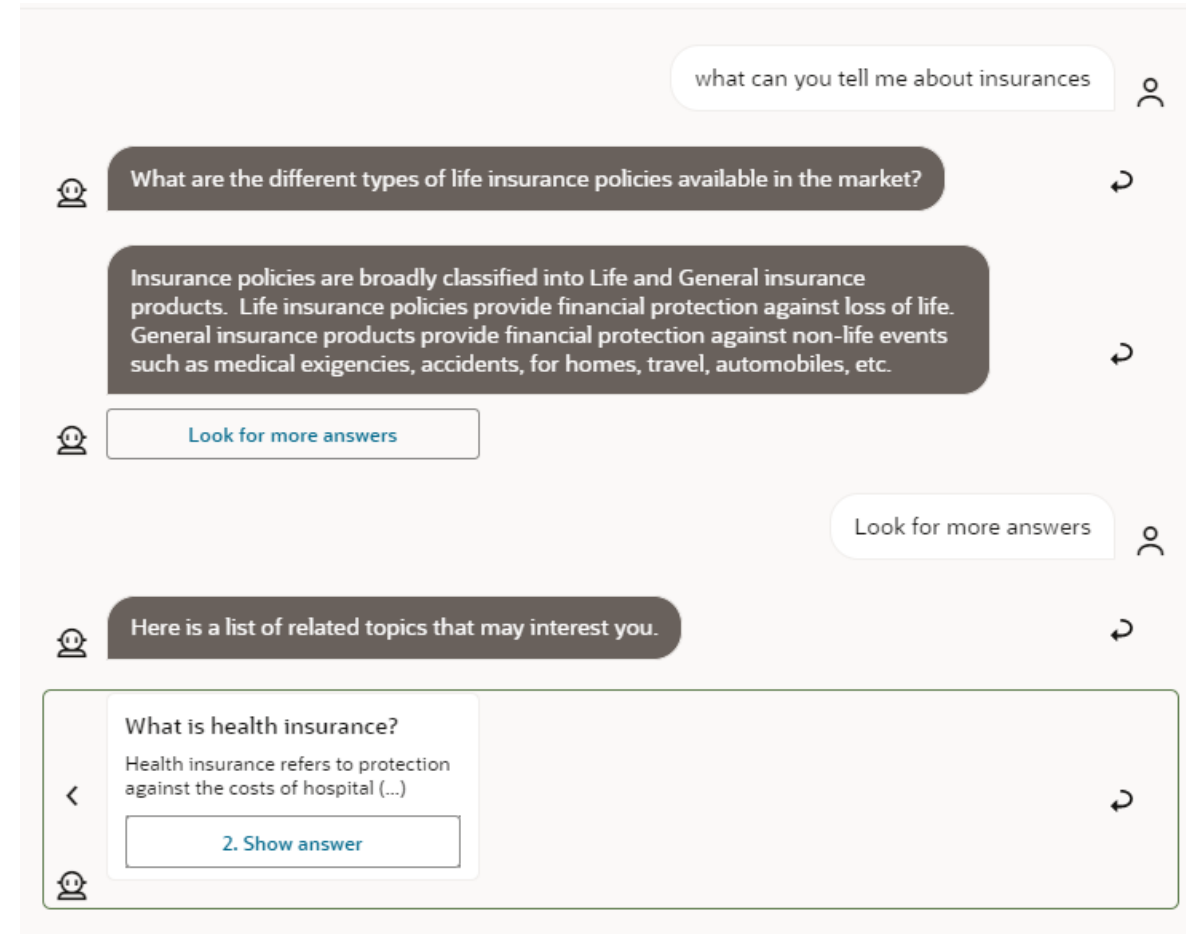
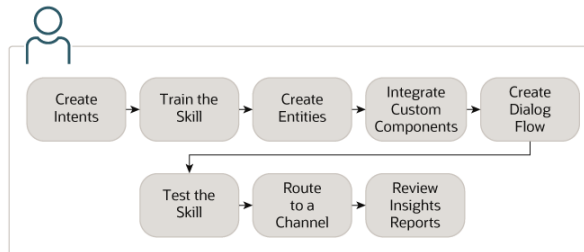
Choose your own adventure. Help users accomplish tasks through conversation.

Oracle Digital Assistant is a platform that allows you to create and deploy digital assistants for your users.

With Oracle Digital Assistant, you create:

- **Digital assistants**, AI-driven interfaces (aka chatbots) that help users accomplish tasks through conversation. Each chatbot has at least one skill.
- **Skills** are focused on a specific task, like creating an expense reports.

You can add **skills** to **digital assistants** or deploy them to a channel on their own.



<https://blogs.oracle.com/digitalassistant/post/a-showcase-of-best-practices-with-the-new-financial-digital-assistant-sample>
<https://docs.oracle.com/en/cloud/paas/digital-assistant/use-chatbot/create-configure-and-version-skills1.html#GUID-A782BB61-0602-45BE-95D9-DCE677260F25>

The Case for Combining OGL and Oracle Chatbots

OGL eases adoption of PeopleSoft, while **Chatbots** provide an additional conversational UI.

Complementary Strengths:

- OGL: Best for guided learning, on-demand context, and process adherence. Quick to develop.
- Chatbots: Best for conversational support, Q&A, and automation. Greater complexity to develop.

Potential Synergy:

- Chatbots can provide dynamic support by offering OGL guides.
- Users then get guided steps from OGL while Chatbots answer additional questions.

Possible Use Cases for OGL + Oracle Chatbots

1. New Hire Onboarding: **Sequential Support**

- OGL: Guides new hires through system setup, essential workflows, and navigation.
- Chatbot: Answers common new-hire questions (e.g., benefits enrollment, policy information).

2. Expense Management: **Parallel Support**

- OGL: Guides users through creating and submitting expense reports, or add Smart Tips for difficult fields.
- Chatbot: Answers policy questions or addresses troubleshooting needs for error messages.

3. Self-Service HR Processes: **Dynamic Support**

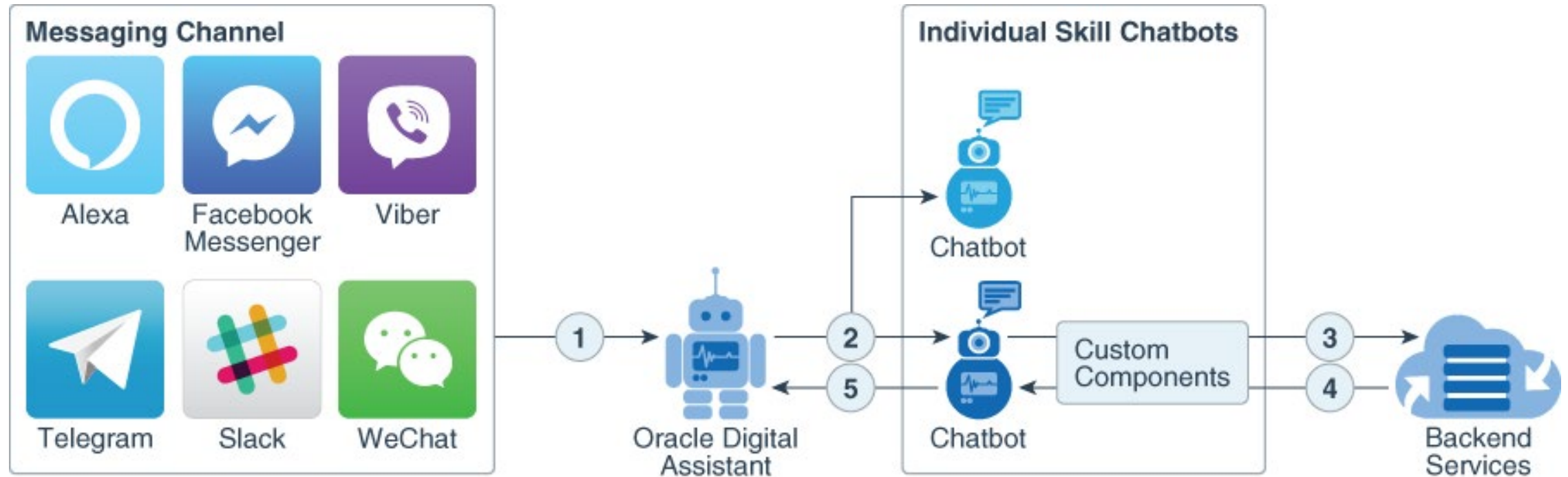
- Chatbot: Offers real-time support, handling FAQs or providing relevant links to launch OGL guides.
- OGL: Provides step-by-step guidance on tasks like updating personal information.

Benefits of Integrating OGL with Chatbots

- **Enhanced User Experience:**
Users can access tailored structured guidance (OGL) through conversational assistance (Chatbots).
- **Improved Efficiency:**
Faster onboarding, fewer training bottlenecks, and reduced helpdesk inquiries.
- **Increase Adoption Rates:**
Continuous support encourages engagement with new features.
- **Data Quality and Compliance:**
Both tools can monitor accuracy and compliance of data entered.

Technical Integration Overview

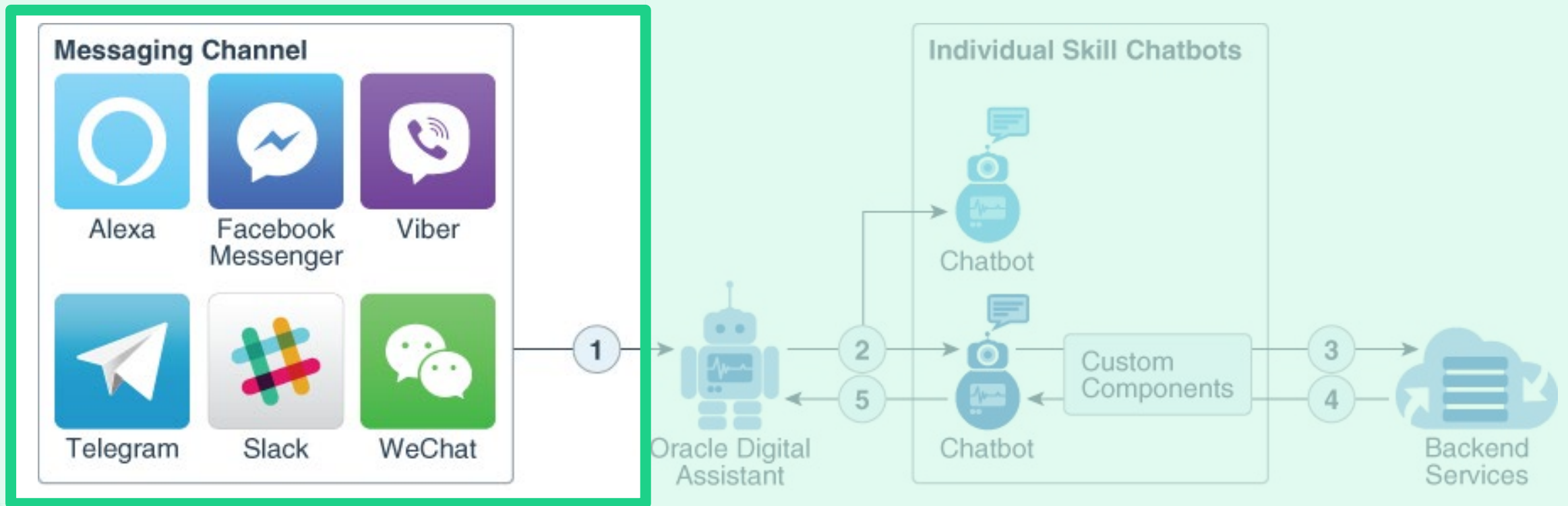
► Option 1: Use the **OGL API** in a **Chatbot Component**.



<https://docs.oracle.com/en/solutions/learn-about-designing-chatbot/index.html#GUID-8A20611F-DB10-420B-9F5E-09ECE8083229>

Technical Integration Overview

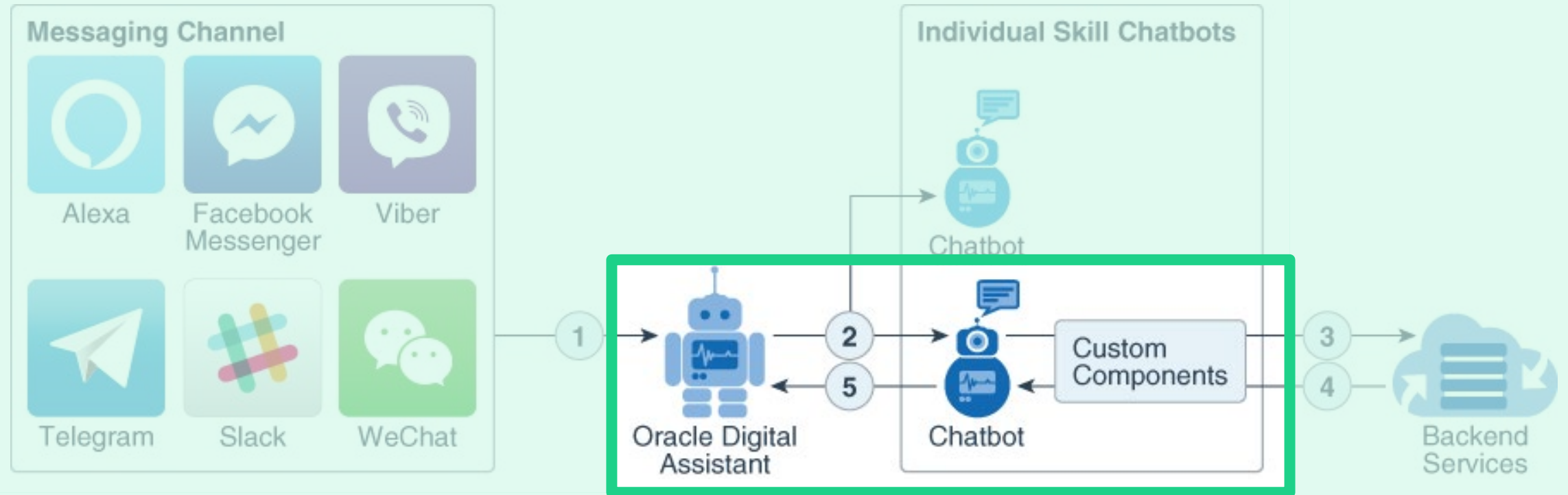
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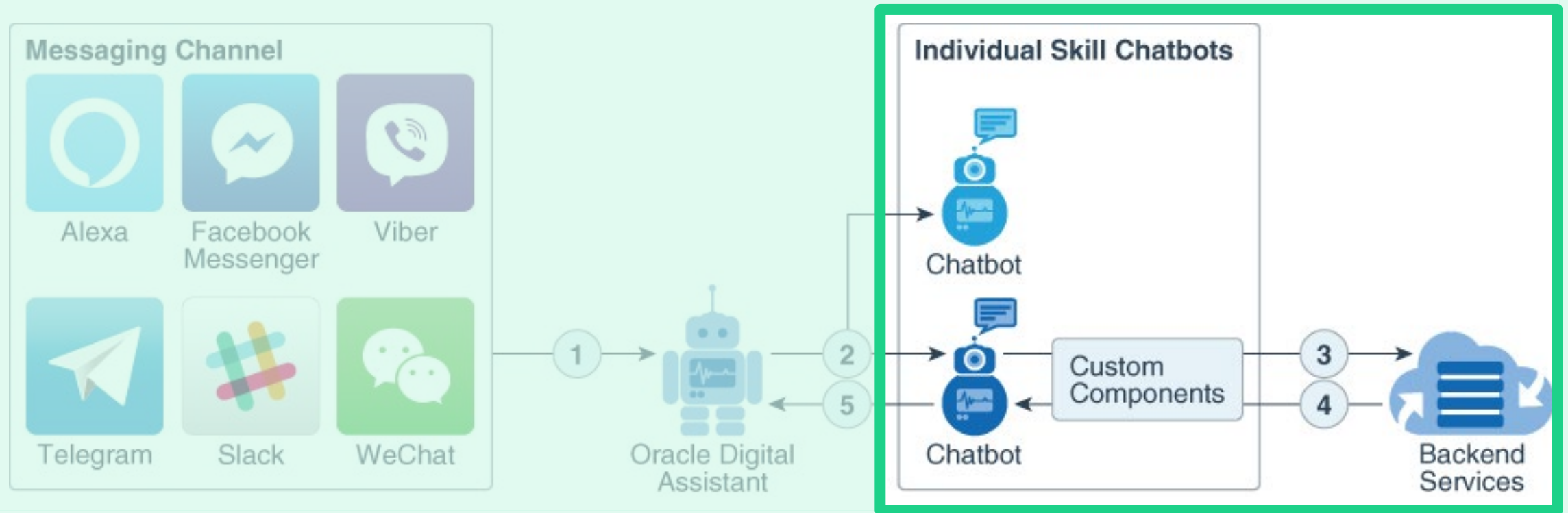
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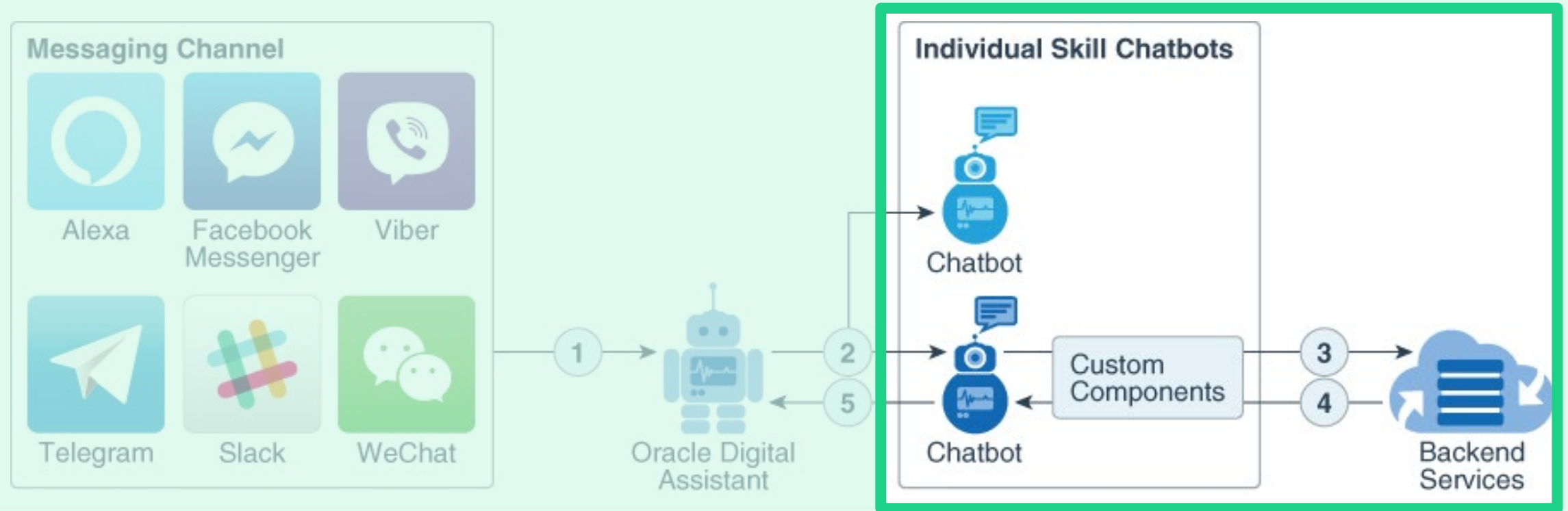
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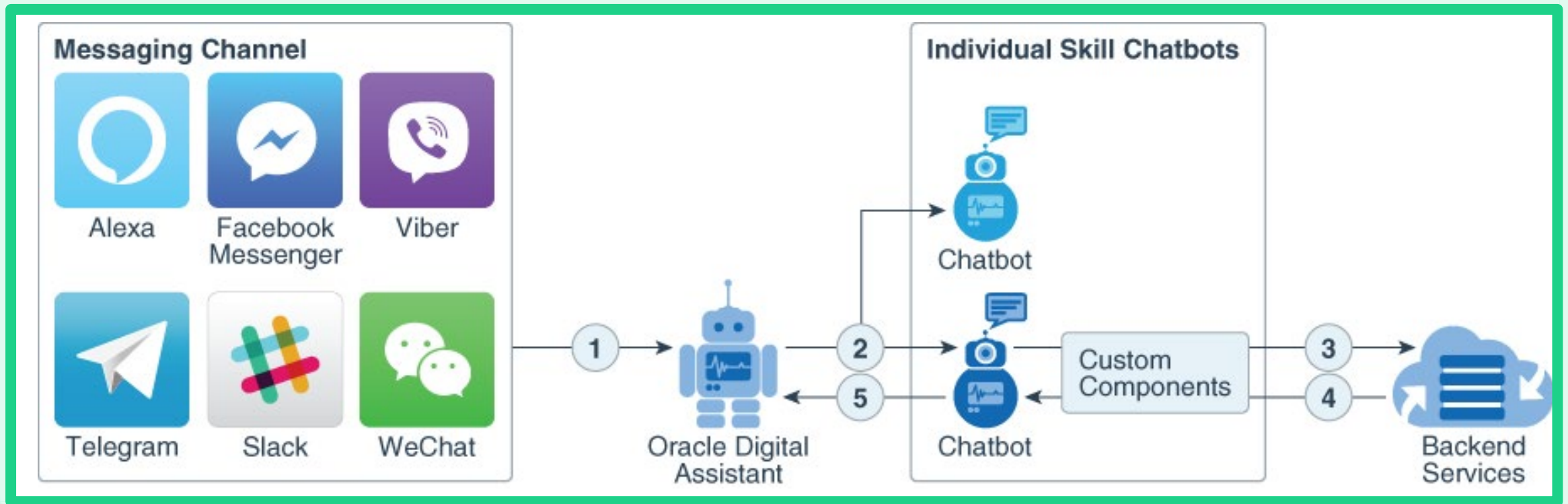
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Technical Integration Overview

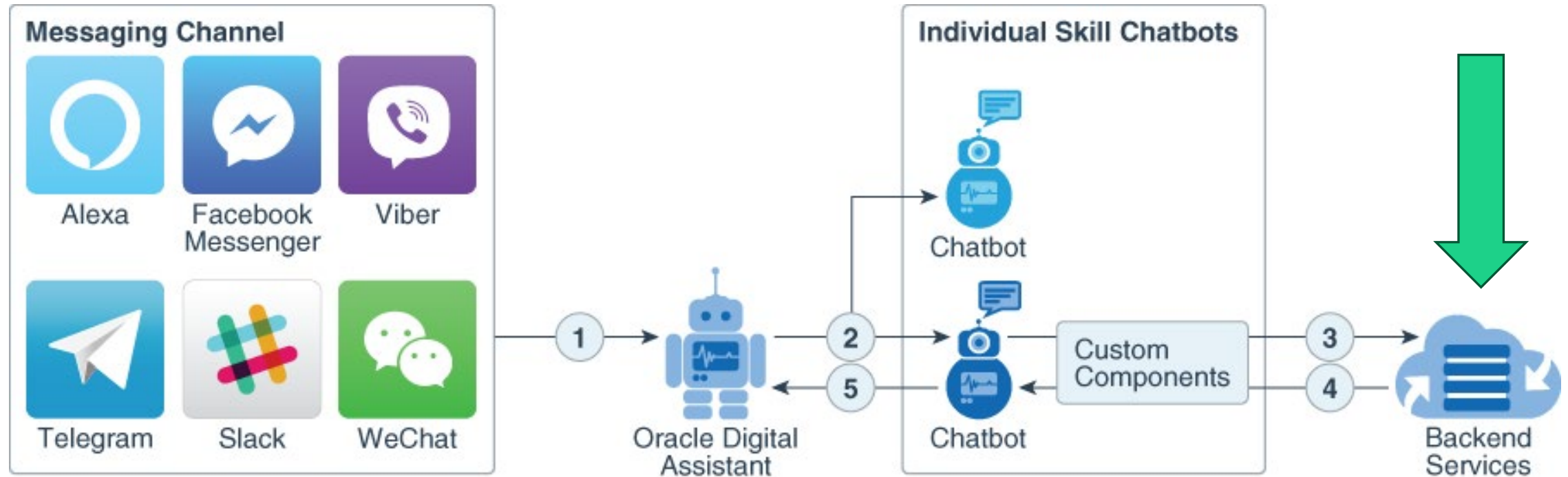
- Option 1: Use the **OGL API** in a **Chatbot Component**.



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Technical Integration Overview

► Option 1: Use the **OGI API** in a **Chatbot Component**.

```
iridize("api.foo.bar", {callData:theData},function optionalCallback(data) {});
```

► **Set** a field to activate specific guides.

```
iridize("api.fields.set", {  
  user_id:"PS_USER_ID_HERE",  
  joined_at:629848800  
  empl_onboarding:true  
  empl_type:"hourly"  
});
```

► **Set** a variable to use in any guide as *{{variable name}}*.

```
iridize("api.vars.set", {"first name":"Tarunraj"});
```

► **Launch** a guide at a certain step.

```
iridize("api.guide.start", {apiName : "foobar", step:"5"});
```

Technical Integration Overview

► Option 1: Use the **OGL API** in a **Chatbot Component**.

Additional Documentation:

- Learn About Designing Chatbots with Oracle Digital Assistant
 - <https://docs.oracle.com/en/solutions/learn-about-designing-chatbot/index.html>
- Creating Custom Components to Integrate with Backend Services:
 - <https://docs.oracle.com/en/cloud/paas/digital-assistant/tutorial-cc-dev/index.html>
- OGL Iridize API Documentation:
 - <https://docs.oracle.com/en/education/customer-success/guided-learning/ogl-faq/administration.html#GUID-9059C5AB-B0D4-4A0B-B049-28B6274AD54C>

Technical Integration Overview

- **Option 2:** Create a skill that uses a permalink to launch OGL guides.
 - The permalink uses the format `http://myapp.com/profile?stStart=abcdefg`
 - See an example from this joint demo with Gideon Taylor.



Some Considerations for Implementation

Audience Segmentation:

- ➡ Use fields in OGL to decide who can access specific guides.

User Adoption Strategies:

- ➡ Clear communication of new support features, using OGL messages

Content Management:

- ➡ Regularly update OGL guides and Chatbot scripts to reflect current processes

Monitoring and Analytics:

- ➡ Use engagement metrics to refine OGL workflows and chatbot responses

Conclusion & Next Steps

Summary:

- ▶ OGL is simpler to implement than Chatbots, and can provide a quick ROI.
- ▶ Chatbots offer powerful conversation-based automation, but takes effort to develop.
- ▶ These tools synergize to allow Chatbots to quickly provide value by delivering OGL guides.
- ▶ In the long term, OGL + Chatbots provides a versatile self-service support framework.
- ▶ Together, they can drive user adoption, efficiency, and process adherence.

Next Steps:

- ▶ Contact SpearMC to discuss an OGL pilot to evaluate user response and gather feedback.

Oracle's Designated Partner

SpearMC is the OGL for PeopleSoft Value Add Reseller/Implementer

SpearMC Value Added Licensing Includes:

- Installation
- Proof of Concept Build of Guides
- Best Practice Design Standards
- Training Workshop
- OGL for PeopleSoft Special Interest Group with Quarterly Trainings
- Annual Assessment/Optimization

Ongoing Managed Services

- Access to OGL Starter Kit (pre-built content)
- 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

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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

**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

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SpearMC Sessions

Date	Time (ET)	Session Title	Presenter	Session #
10/29	12:00 PM	Business Process Weaver – Automation please!	Jessica Mann Yuliya Ivanova	P-049639
10/29	1:30 PM	Demo Enhancing Internal Controls Using a Segregation of Duties Analyzer	Randy Johnson	DEMO
10/29	1:45 PM	Learn PeopleSoft Today, Invest in Your Future with PeopleSoft All Access Learning Pass. Product Demonstration for PeopleTools, FSCM, HCM and Campus Solutions.	Marcus Bode Susan Caranante	DEMO
10/29	2:30 PM	A Fresh Look at PeopleSoft Grants Management	Jessica Mann	P-049641
10/29	3:45 PM	Customer Panel - Oracle Guided Learning	Cameron McClurg	P-049755
10/30	12:00 PM	Exploring PeopleSoft PICASO: A Guided Demo of Chatbot Capabilities	Joe Finlinson	DEMO
10/30	1:15 PM	Achieve a Seamlessly Integrated Time, Absence, Payroll Management Solution using PeopleSoft HCM	Logesh Balasubramaniam	P-049960
10/30	3:00 PM	PeopleSoft Automated Testing and PTF Accelerators at NDUS and State of ND	Tarun Amuthan	DEMO
10/30	3:45 PM	PeopleSoft Fluid Delegation Framework Best Practices	Randy Johnson	P-049664
10/30	5:00 PM	Taking PeopleSoft Chatbots to the Next Level with Oracle Guided Learning (OGL)	Tarun Amuthan	P-049649
10/31	11:00 AM	Demo Using the Powerful Fluid Navigation Collections Framework	Logesh Balasubramaniam	DEMO
10/31	11:15 AM	OGL: Real Time Guided Processing for Students, Applicants, Employees, Suppliers & Customers	Cameron McClurg	DEMO
10/31	2:30 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randy Johnson	P-049663

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Q&A

- Do you have any use cases that come to mind?
- Do you have technical integration concerns? What would help?
- How will your organization measure ROI from tools like this?
- What do you need to feel comfortable piloting a tool like OGL?

Questions?

Contact me:

tarunraj.amuthan@spearmc.com

(925) 699-3478

Session ID:

P-049649 Taking PeopleSoft Chatbots to the Next Level with Oracle Guided Learning (OGL)



Quest
PeopleSoft
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PeopleSoft

RECONNECT

DIVE DEEP - VIRTUAL!



LOVE THIS SESSION?

GO TO THIS SESSION'S
LISTING IN THE MOBILE APP
AND CLICK **RATE SESSION** TO
COMPLETE A BRIEF SURVEY

PeopleSoft

RECONNECT

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At Quest, you belong.

Swap stories, ask questions, find answers, and learn from other Oracle users.

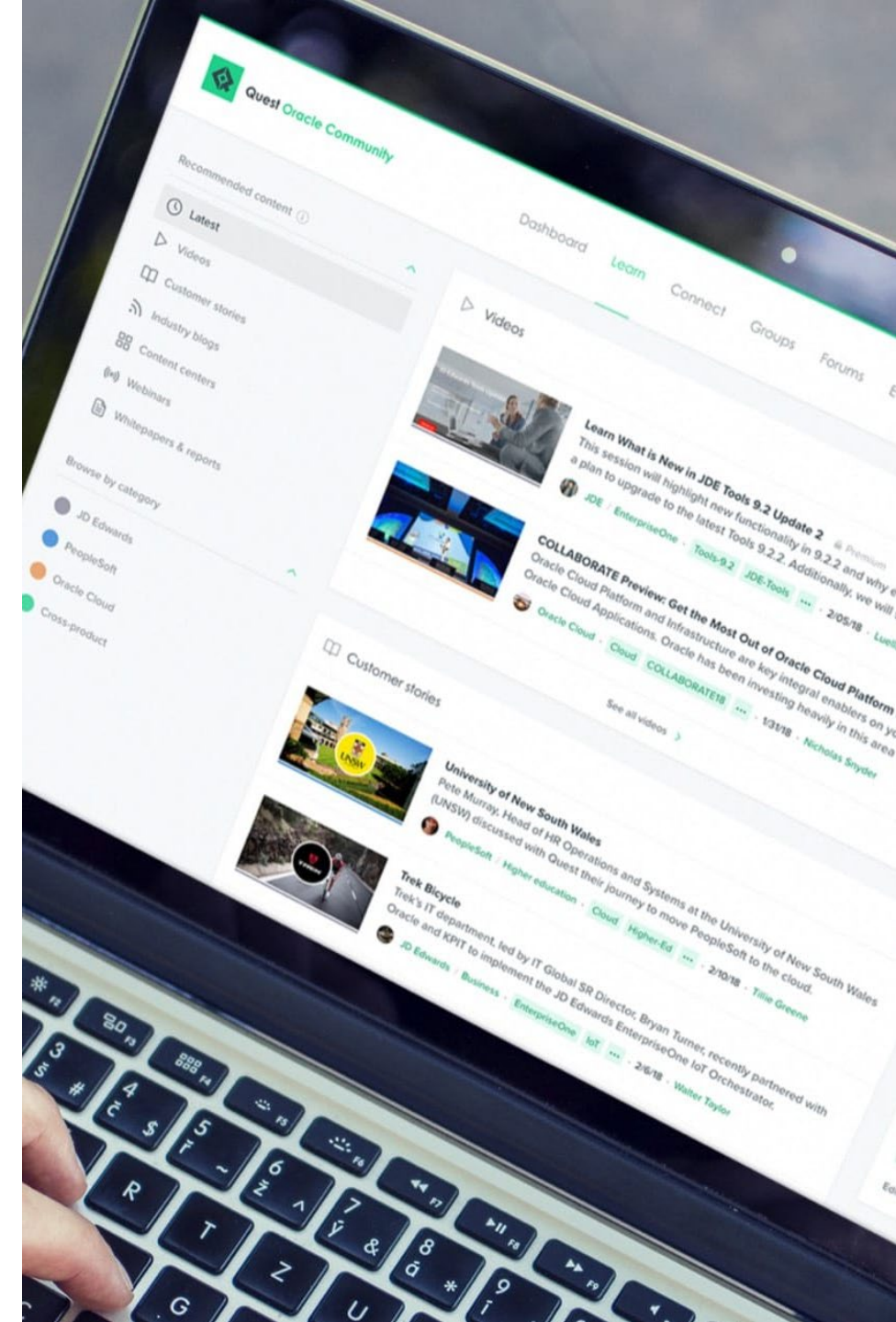
Quest Helps: Individuals

- Increase their personal knowledge, skills, and efficiency.
- Find answers and solve problems.
- Make better, informed decisions.
- Increase their sphere of professional influence and advance their careers.

Quest Helps: Companies

- Become more efficient in their use and deployment of Oracle products.
- Transform their organizations and modernize their product planning.
- Recognize opportunities for efficiency gains and cost savings.

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and learn from the PeopleSoft community.

The PeopleSoft community offers:

Event Hubs

Browse 145 digital sessions from RECONNECT 23 or dig into other past conference content, organized by track or hot topic

Special Interest Groups

Take your pick of 30 informal PeopleSoft discussion groups including General Ledger, Payroll, Financials, Tech and a host of other hot topics, including dedicated industry groups.

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Expand your PeopleSoft knowledge on Kibana, PICASO, PeopleTools, Selective Adoption and other hot topics

Learn more at questoraclecommunity.org/peoplesoft



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June 10 – 13, 2025

The Venetian in Las Vegas, NV



Quest Experience Week PeopleSoft Day

December 10, 2024

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 **BLUEPRINT 4D™**

JUNE 10 – 13, 2025

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Appendix

2024 Training Calendar

Date	Session Title
Nov 4	PeopleSoft 9.2 Query Basic & Intermediate for HCM
Nov 5	PeopleSoft 9.2 Query Advanced for HCM
Nov 7	PeopleTools 8.59-8.61 OpenSearch Dashboards
Dec 10-11, 17-18	PeopleTools 8.59-8.61 System Administration: Maintenance and Troubleshooting

Visit our [website](#) for additional details

2025 Training Calendar

Date	Session Title
Jan 22	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
Jan 23	PeopleSoft 9.2 Query Advanced for FSCM
Feb 19	PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions
Feb 20	PeopleSoft 9.2 Query Advanced for Campus Solutions

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