

A light gray world map is centered in the background. A red location pin icon is placed over the continent of Australia, specifically in the eastern part of the continent.

# Oracle Guided Learning for PeopleSoft

**HEUG Australia & New Zealand - Brisbane**

October 30 – November 1, 2023

Brisbane Convention & Exhibition Centre

# Your Presenter



**ORACLE®**  
**Certified Specialist**

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

# Agenda

- Introductions
- Legacy Training
- Digital Adoption Platforms
- Oracle Guided Learning

# 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

## SOC 2 Type II Certified

<p><b>ORACLE</b>   Partner</p> <p>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.</p>	<p><b>ORACLE</b>   Expertise in <b>PeopleSoft</b> in North America</p> <p>SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.</p>	<p><b>ORACLE</b>   Expertise in <b>Oracle EPM Cloud</b> in North America</p> <p>SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.</p>
<p><b>ORACLE</b>   Expertise in <b>Oracle Cloud Platform</b> in North America</p> <p>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.</p>	<p><b>ORACLE</b>   Education Reseller</p> <p>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.</p>	<p><b>ORACLE</b>   Public Sector Addendum</p> <p>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.</p>



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 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



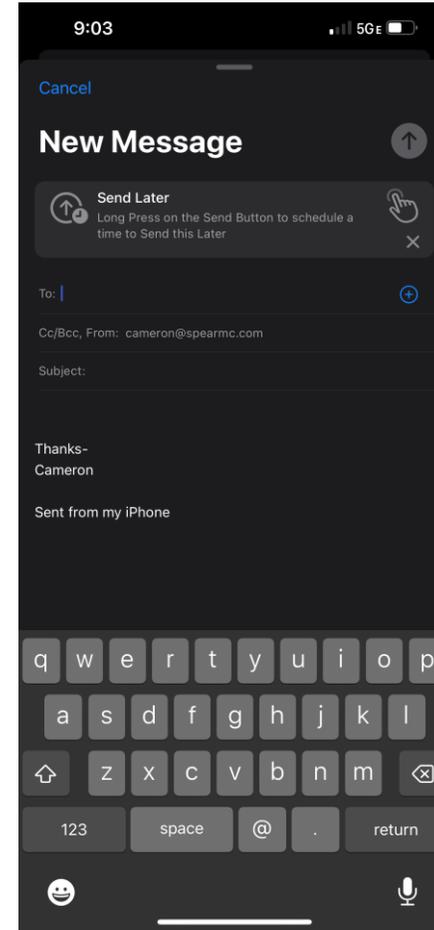
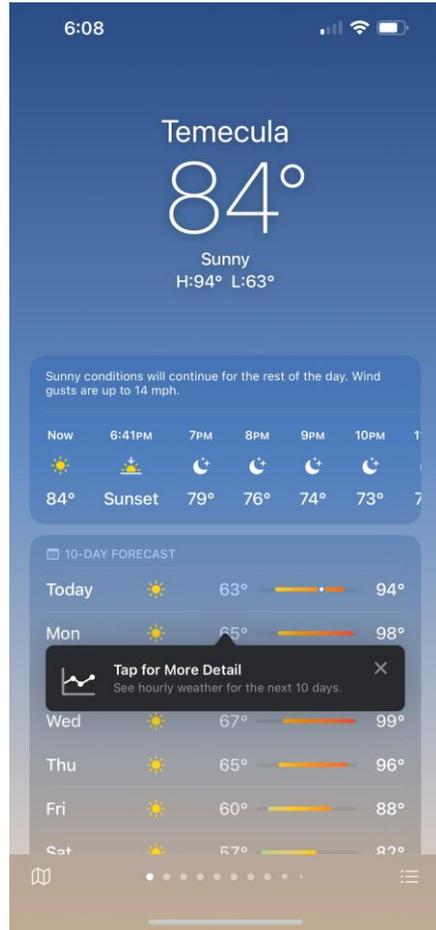
# Legacy Training

# Legacy Training

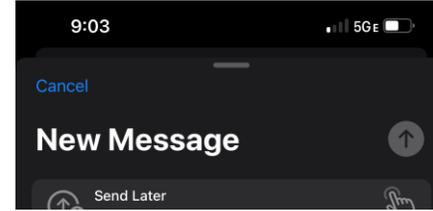


# Digital Adoption Platforms

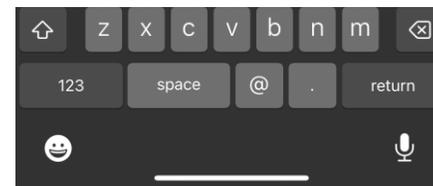
# What is a Digital Adoption Platform



# 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.



# Oracle Guided Learning

# 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

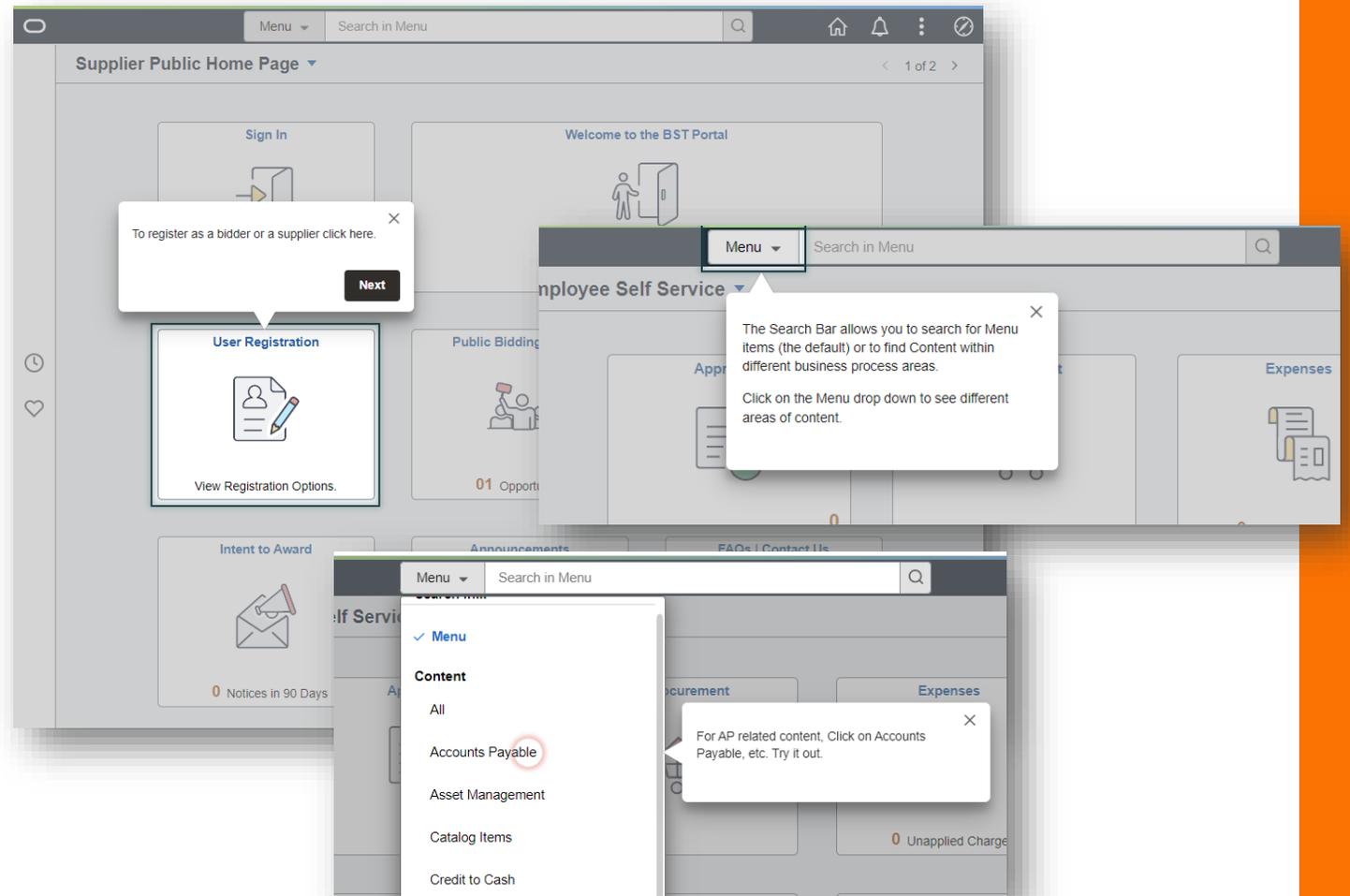
Find out what guides are being used and what transactions users are needing guides to get through

# 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



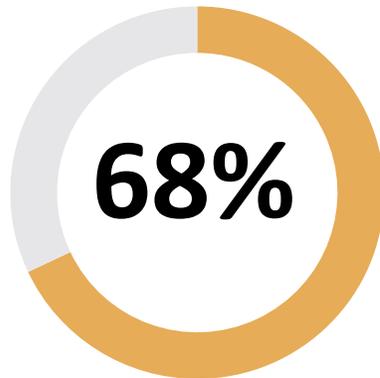
Users enabled through just-in-time, context-sensitive learning that is personalized for each role and your organization



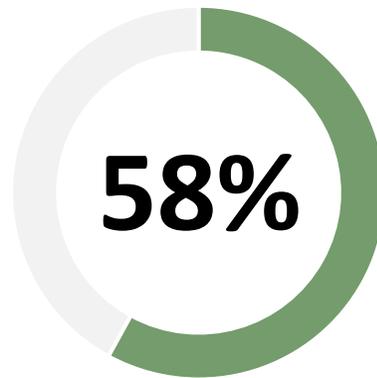
Manage Change Communications around upgrades, process, and policy changes



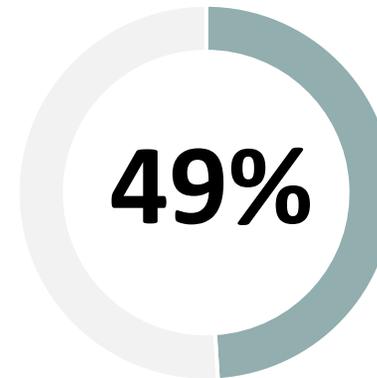
Fewer support calls and lower costs - analytics to consistently optimize usage/adoption



*of employees prefer to learn at work*



*of employees prefer to learn at their own pace*

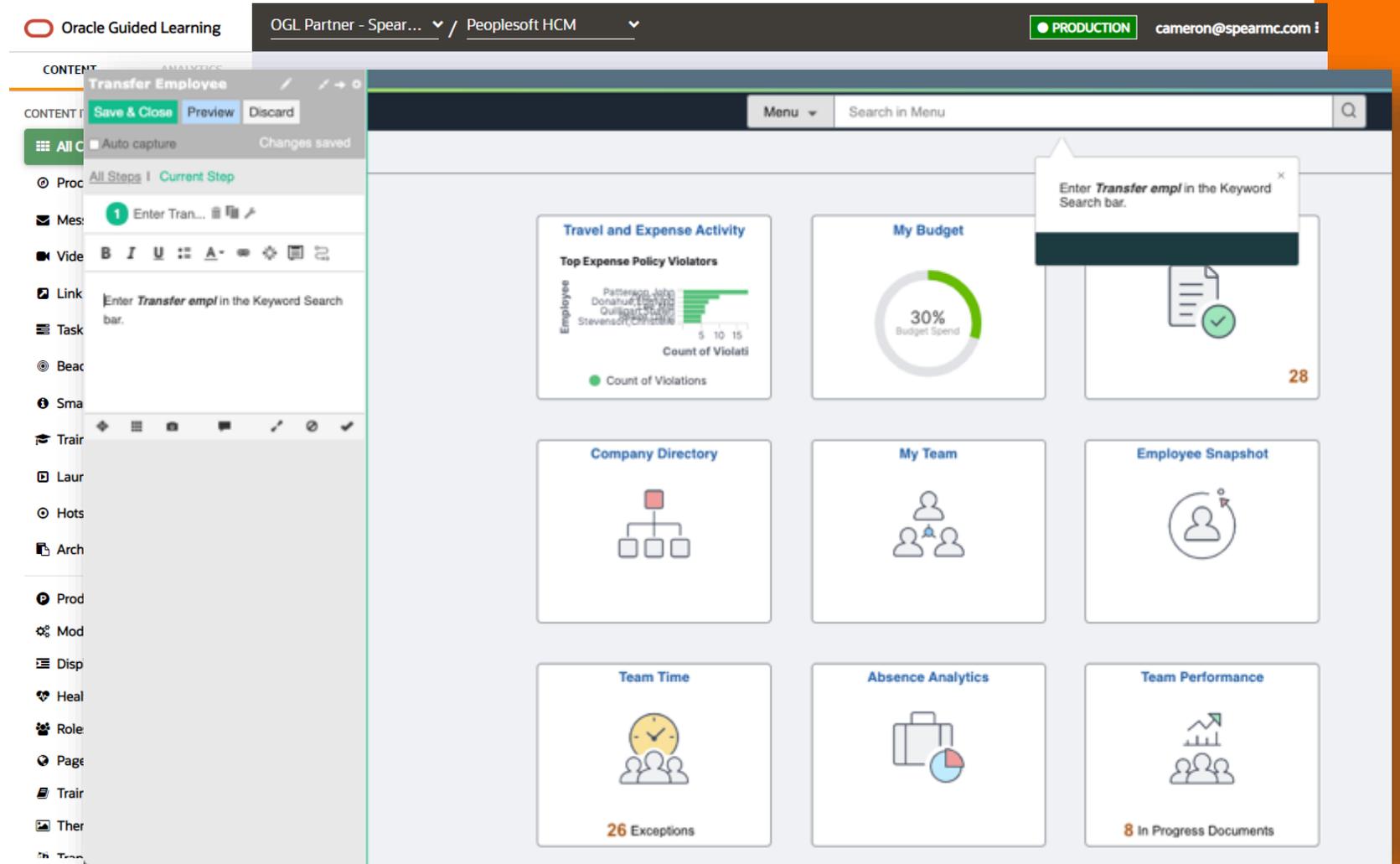


*of employees prefer to learn at the point of need*

# 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



# 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 shows the Oracle Guided Learning Analytics Dashboard. The main dashboard includes a navigation menu on the left, a top navigation bar with 'HOME / PROCESS' and a date range of '10/20/2020 - 11/19/2020', and a central area with a 'GUIDE RUNS' line chart and a 'GUIDE DATA ANALYSIS' table. A filter overlay is open, showing options for 'Report Type' (User, Feedback, Bulk), 'Date Range' (From: 2021-03-01, To: 2021-03-31), 'Application(s)', 'User(s)', 'Guide Type', and 'Guide Status'. The 'User' report type is selected, and the 'Select User(s) and Guide(s)' option is chosen. The 'Date Range' is set to March 1-31, 2021. The 'Application(s)' dropdown is open, showing 'Select Application(s)'. The 'User(s)' section has 'All' selected. The 'Guide Type' section has 'All' selected. The 'Guide Status' section has 'All' selected. On the right side of the dashboard, there is a 'Report for Kaiser Development A' section with a 'Report Type' of 'User', 'Application(s)' of '2/1 (all/selected)', 'Module' of '0 (selected)', 'Training Type' of 'ALL', and 'Platform' of 'Desktop, Mobile, Guide Manager'. There are 'Update Preview' and 'Download Report' buttons, and a 'Row Count: 58' indicator. A table of guide names and IDs is visible at the bottom right.

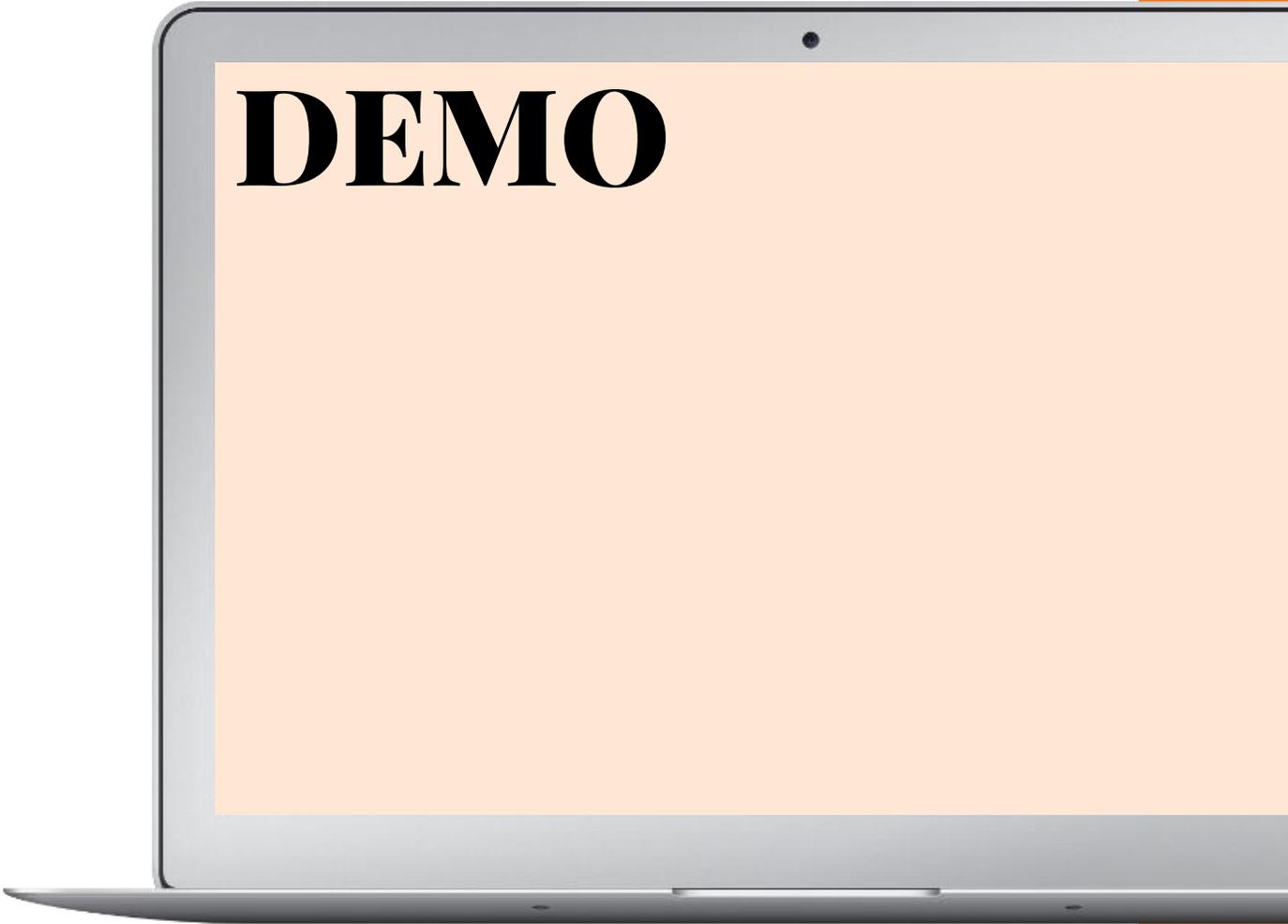
GUIDE NAME	GUIDE ID
Add/update chartfield or budg...	33isysrr
Inquire on budget details	rkiqw6rv
View or print an expense report	s0u0u7h8
ST-Spro-Route Document for C...	6mpp4knv
ePro Requisition Minimum Ord...	gy9wgxkf
ST-Create par location	lipilyzk
Modify FDA delegation	n14hff7y
OneLink Website	mcyusz3a
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 screenshot displays the Oracle Guided Learning (OGL) interface. It features a 'STEP VIDEO' player showing a user navigating through the 'Add Banking Details' process. To the right, a print settings panel is visible, showing options for destination (HP OfficeJet 4650 ser), pages (All), copies (1), layout (Portrait), and color (Color). Below the video, a 'STEP 1' section shows a grid of icons for various tasks like Approvals, Company Direct, Team Time, Absence Analytics, and Team Performance. A 'STEP 2' section is partially visible below. In the foreground, an email client window titled 'Step Guide - Message (HTML)' is open, showing the 'Options' tab with various settings like Colors, Fonts, Effects, Page Color, Bcc, and Request a Delivery Receipt. The 'From' field is set to 'cameron@spearmc.com' and the subject is 'Step Guide'. A URL is provided at the bottom of the email window: [https://guidedlearning.oracle.com/player/latest/api/scenario/export/FpyqTNqfRGqzQjs9zzLkMQ/m34z4dk/lang/--/?draft=dev&\\_id=1654097265400](https://guidedlearning.oracle.com/player/latest/api/scenario/export/FpyqTNqfRGqzQjs9zzLkMQ/m34z4dk/lang/--/?draft=dev&_id=1654097265400)



# Frequently Asked Questions

Does OGL work for PeopleSoft on Prem?	Yes
Does OGL work for PeopleSoft in Classic Mode?	Yes
Does OGL work for PeopleSoft on Prem?	Yes
Does OGL support Multi-Language?	Yes
Does OGL work on PeopleTools 8.5x?	Works on 8.55 or higher
Does OGL work on PeopleSoft 9.1?	Yes
Does OGL work on Non-Oracle Applications?	Yes, for HTML based applications.
How does Pricing work?	

# 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](mailto: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
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**OGL for PeopleSoft  
Starter Kit - FSCM**

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

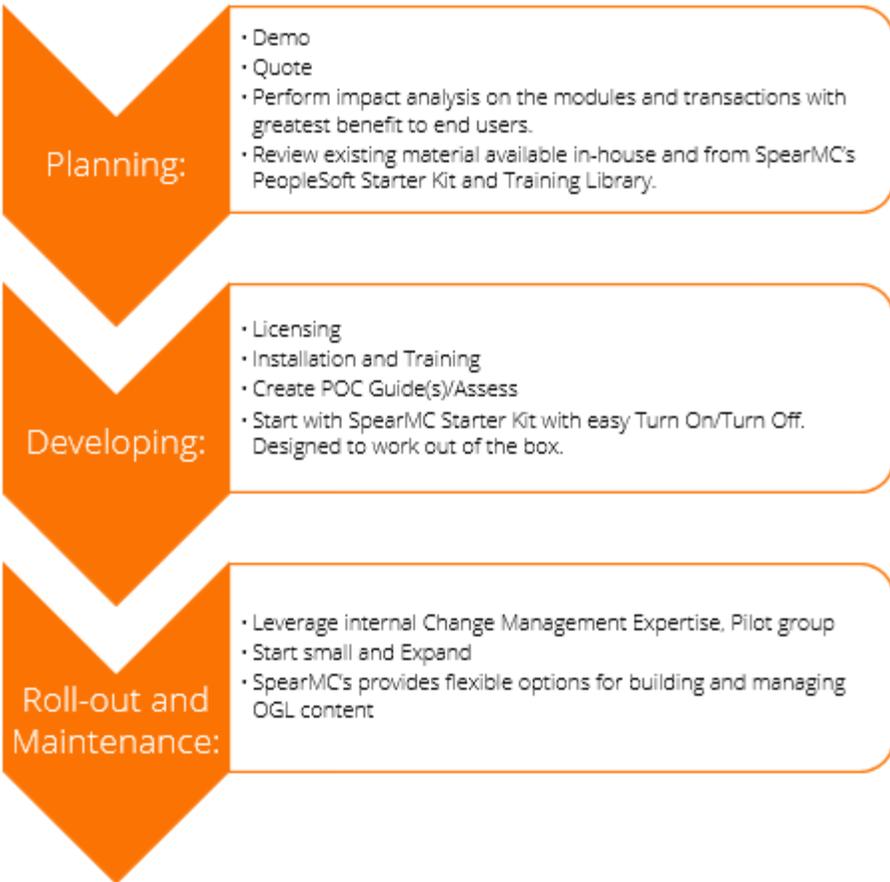
FSCM Module	Guide
General	Intro to OGL with Remind Me Later Feature
General	Survey Starter
AM, AP, & GL	Create Regular PO Voucher
AM, AP, & GL	Create Adjustment Voucher
AM, AP, & GL	Reversal Voucher
AM, AP, & GL	Close Vouchers
AM, AP, & GL	Request a New ChartField Value
AM, AP, & GL	Create Regular PO 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

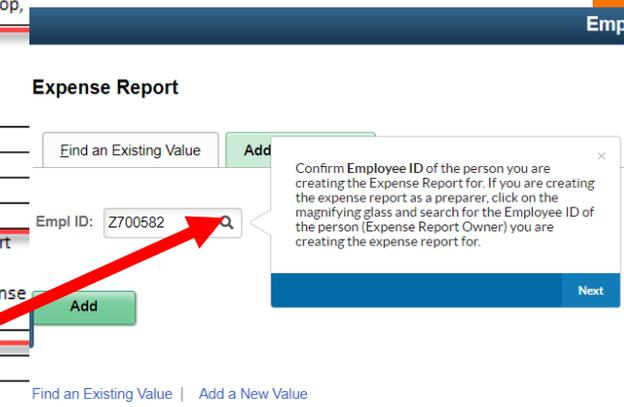
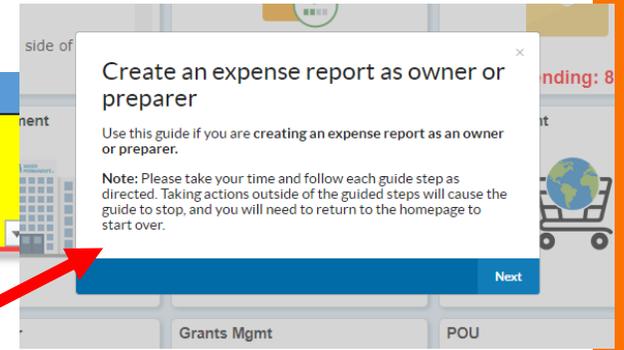
HCM Module	Guide
General	Intro to OGL with Remind Me Later Feature
General	Survey Starter
Absence Management	Using Schedules - Defining Workdays
Absence Management	Using Schedules - Creating and Viewing Schedules
Absence Management	Using Schedules - Defining Holiday Schedules
Absence Management	Using 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 – Next Steps

## SpearMC’s Pathway to OGL



Create an Expense Report As Owner or Preparer		
STEP #	Step Description Type	Step Description Value
0	Step Description Introduction	Create an expense report as owner or preparer Use this guide if you are creating an expense report as an owner or preparer.  Note: Please take your time and follow each guide step as directed. Taking actions outside of the guided steps will cause the guide to stop.
1	Step Description	Click Expenses.
1	Step Note	
1	Step Deep Link	
1	Step Smart Tip	
1	Regional Exception	
2	Step Description	Confirm <b>Employee ID</b> of the person you are creating the Expense Report for. If you are creating the expense report as a preparer, click on the magnifying glass and search for the Employee ID of the person (Expense Report Owner) you are creating the expense report for.
2	Step Note	
2	Step Deep Link	



# Questions





# Thank You

**CAMERON MCCLURG**

Vice President

[cameron@spearmc.com](mailto:cameron@spearmc.com)

LinkedIn: [cameron-mcclurg](#)

(206) 819-7851

# Additional Info

**Oracle Blog Post** – [Time to Pay Attention to Oracle Guided Learning](#)

**OGI Success Story** – [How Kaiser Permanente Pioneered OGI on PeopleSoft](#)

**OGI Success Story** – [City of Seattle Modernizes Training with OGI for PeopleSoft](#)

# OGL Accessibility

OGL is designed with accessibility features to support assistive technologies, such as screen readers, as well as keyboard navigation. For more information about Oracle's commitment to accessibility, see <http://oracle.com/accessibility>

## Navigation & Keyboard Shortcuts

Users can navigate within OGL, transition between OGL and the host application, and access all relevant functionality using only the keyboard. Assistive technology is not required to use keyboard-only navigation. When a guide is running and a tip appears, the focus will be placed on the tip and then the Tab key may be used to navigate within the tip. Tabbing accesses the OGL Launcher as the last item on a page's Tab order. Using the keyboard shortcut below to open and close the Help Panel is a quicker method to access OGL.

# OGI Accessibility

Keyboard shortcuts enable user interface actions without a mouse. Following is a list of shortcuts available for OGI and their function:

Keyboard Shortcut	Description
Alt+Ctrl+H	Open and close the Help Panel. The Help Panel will open with focus on the Search bar. The tab button can then be used to navigate within the panel.
Alt+H	Toggle the focus from the tip on screen to the element to which it is associated. The same shortcut is used for toggling focus on the Feedback modal. Please see below for variations for Splash tips with the target element "body": <ul style="list-style-type: none"> <li>• For splash without overlay: Give focus to the first focusable element in the page</li> <li>• For splash with overlay: Screen reader will read " Unable to switch focus from splash tip with overlay"</li> </ul>
Alt+M	This shortcut moves the focus to the first display group on the display group menu.
Esc	If the focus is on the Help Panel, the Esc button will close the Help Panel and return focus to the host application. If the focus is on a tip, the Esc button will close the tip AND close the guide.

# SpearMC Sessions

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

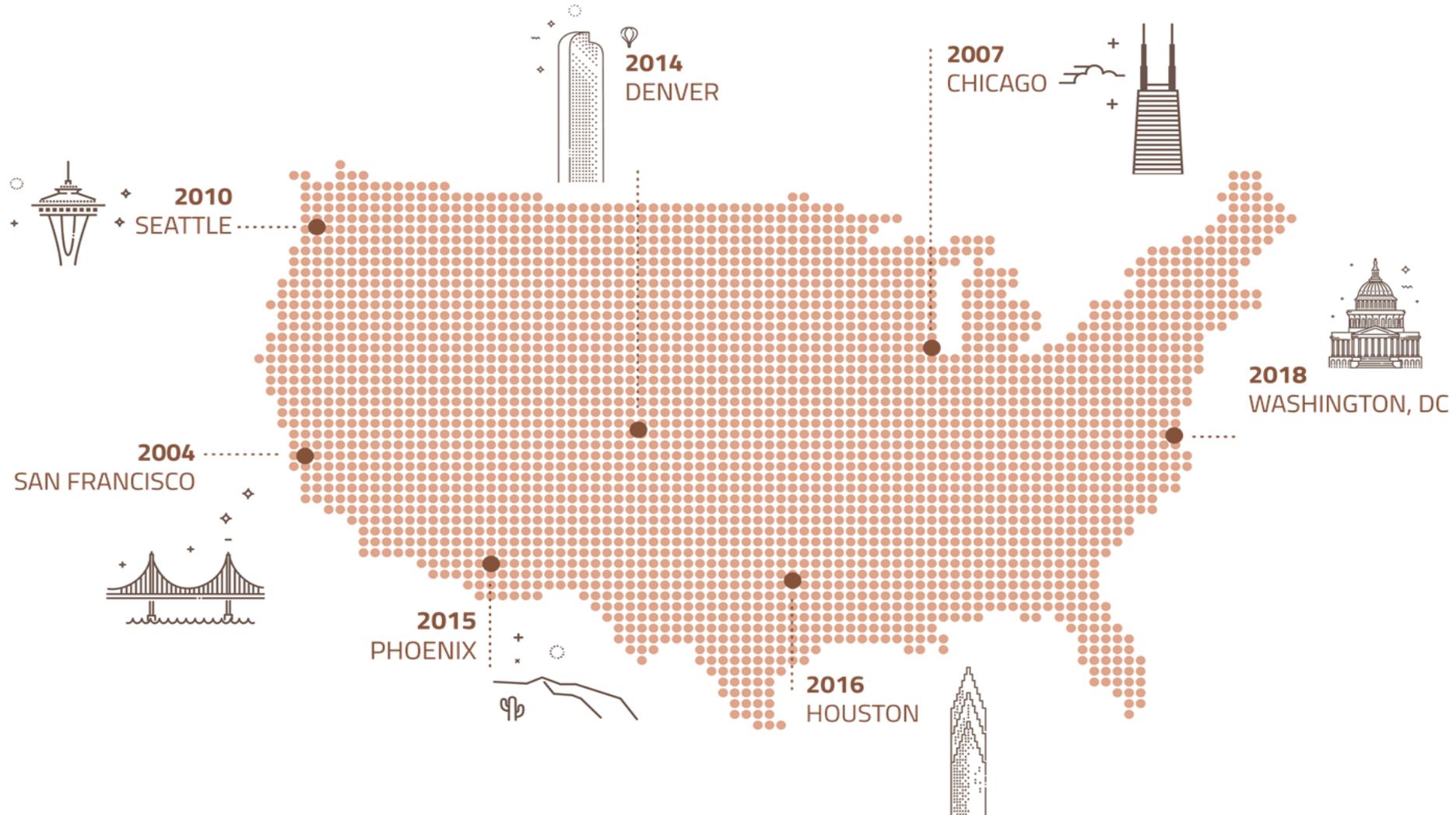
# 2024 Training Calendar

## 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.

