Oracle Guided Learning for PeopleSoft HCM
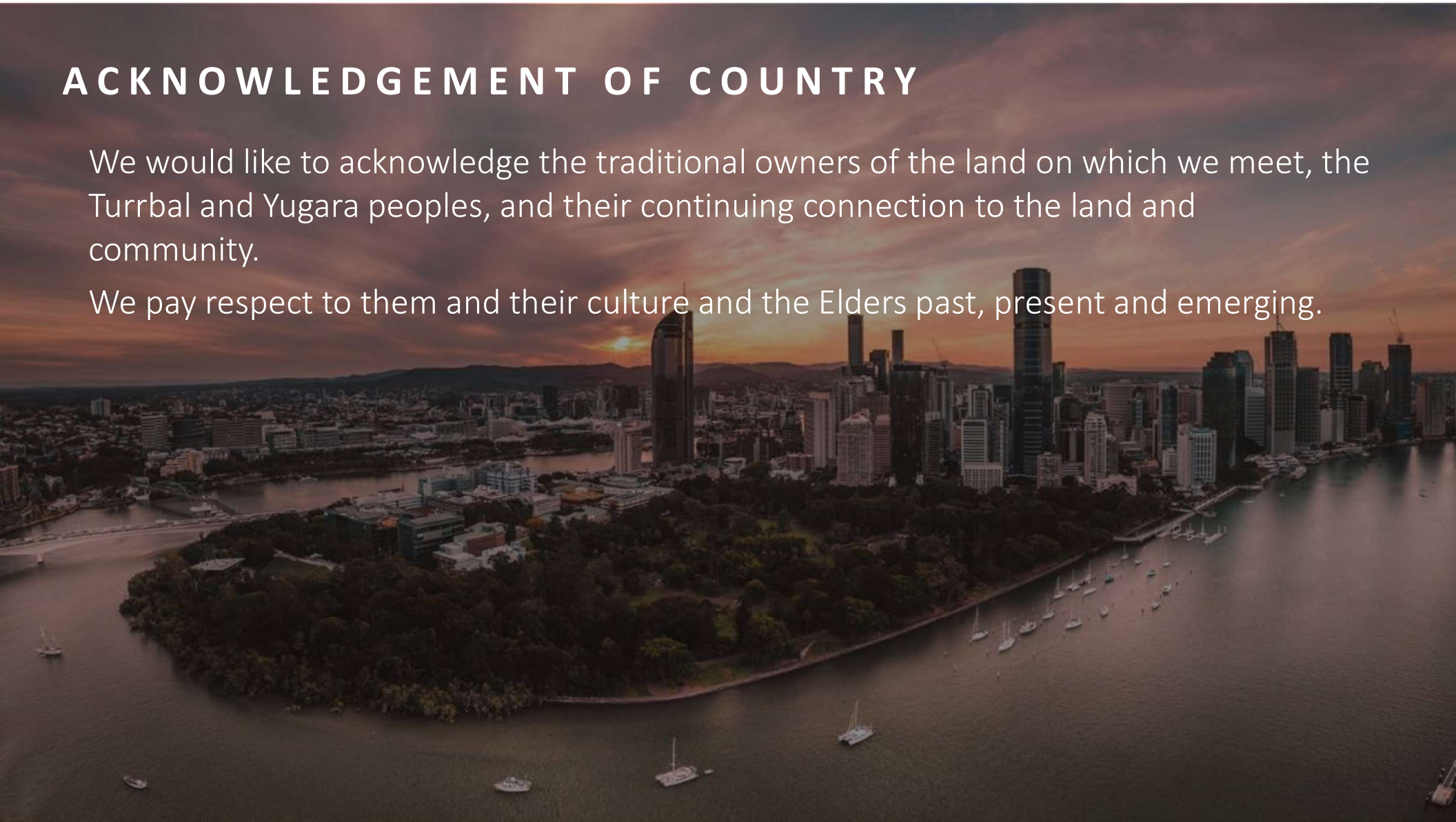
ACKNOWLEDGEMENT OF COUNTRY

We would like to acknowledge the traditional owners of the land on which we meet, the Turrbal and Yugara peoples, and their continuing connection to the land and community.

We pay respect to them and their culture and the Elders past, present and emerging.

About Presenters

Dr. Shirin Jamarani
Digital Adoption Specialist – Deloitte
Consulting

Shirin is a passionate, experienced digital adoption specialist with a solid knowledge in change management and training. She has a demonstrated successful track record of more than 20 years' experience within Higher Education locally and globally.

A Prosci certified, skilled leader in Change Management, Executive and Senior Stakeholder Management, Coaching and Communication, Shirin is passionate about creating healthy and productive workplaces with a focus on developing new approaches to adoption through digital tools, content and services to create engaging Employee Experiences that enable value realisation and ROI at 'cloud speed'.

Deloitte.

Andrew Steele

Customer Success Manager – JAPAC

Customer Success Services – Oracle

Andrew is an innovative and results oriented digital cloud adoption professional with extensive knowledge in customer success management. He has a strong background in financial management, consulting leadership and project delivery including experience in program managing within the Higher Education sector across APAC.

A certified accountant, project management professional and educator supporting Oracle customers across JAPAC to accelerate their learning of cloud solutions and improve their operating support model using Oracle Guided Learning.
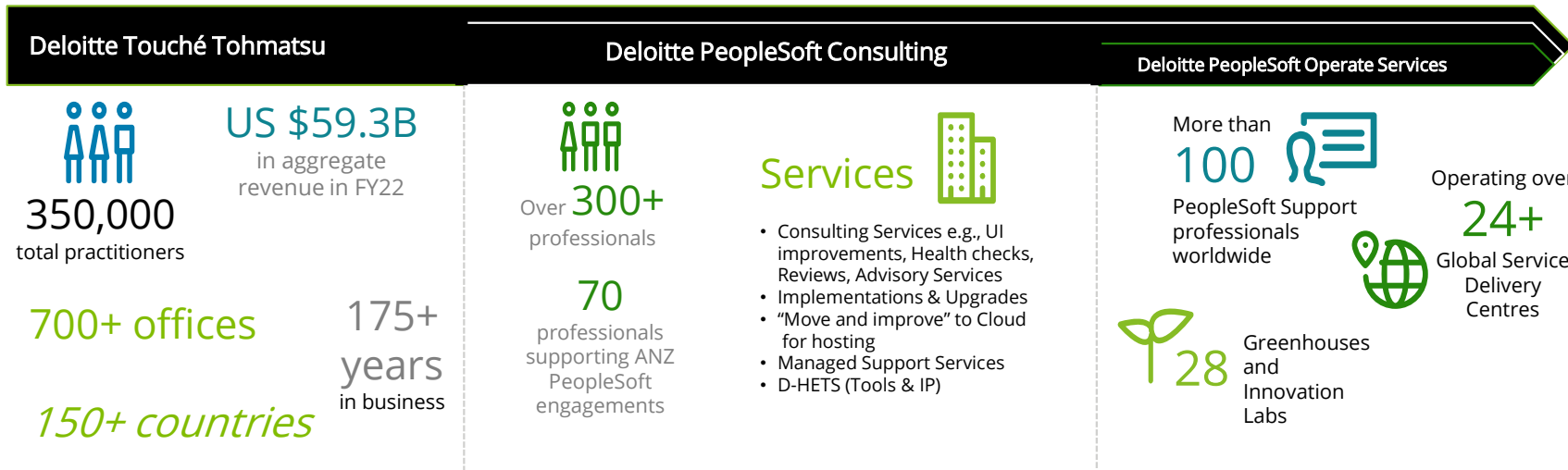
Plan Of The Session

➢ Our PeopleSoft customers' challenges

➢ Traditional Training Approaches

➢ Human Factors and Digital Adoption

➢ Oracle Guided Learning

➢ Measuring Success

WE KNOW PEOPLESOFT AND CUSTOMER CHALLENGES

Deloitte Is The #1 Partner Driving PeopleSoft Innovation

Deloitte Touché Tohmatsu

350,000 total practitioners

US $59.3B in aggregate revenue in FY22

700+ offices

175+ years in business

150+ countries

Deloitte PeopleSoft Consulting

Over **300+** professionals

70 professionals supporting ANZ PeopleSoft engagements

Services

- Consulting Services e.g., UI improvements, Health checks, Reviews, Advisory Services
- Implementations & Upgrades
- "Move and improve" to Cloud for hosting
- Managed Support Services
- D-HETS (Tools & IP)

Deloitte PeopleSoft Operate Services

More than **100** PeopleSoft Support professionals worldwide

Operating over **24+** Global Service Delivery Centres

28 Greenhouses and Innovation Labs

Innovation and ongoing delivery

Oracle PeopleSoft Innovation Awards

Cloud enablement
- Multiple transitions of PeopleSoft on Cloud, Multiple PeopleSoft cloud PaaS innovations, Continuous innovation

User experience
- Fluid, AI/ Chatbots, Analytics, Onboarding, Online applications

Decustomise
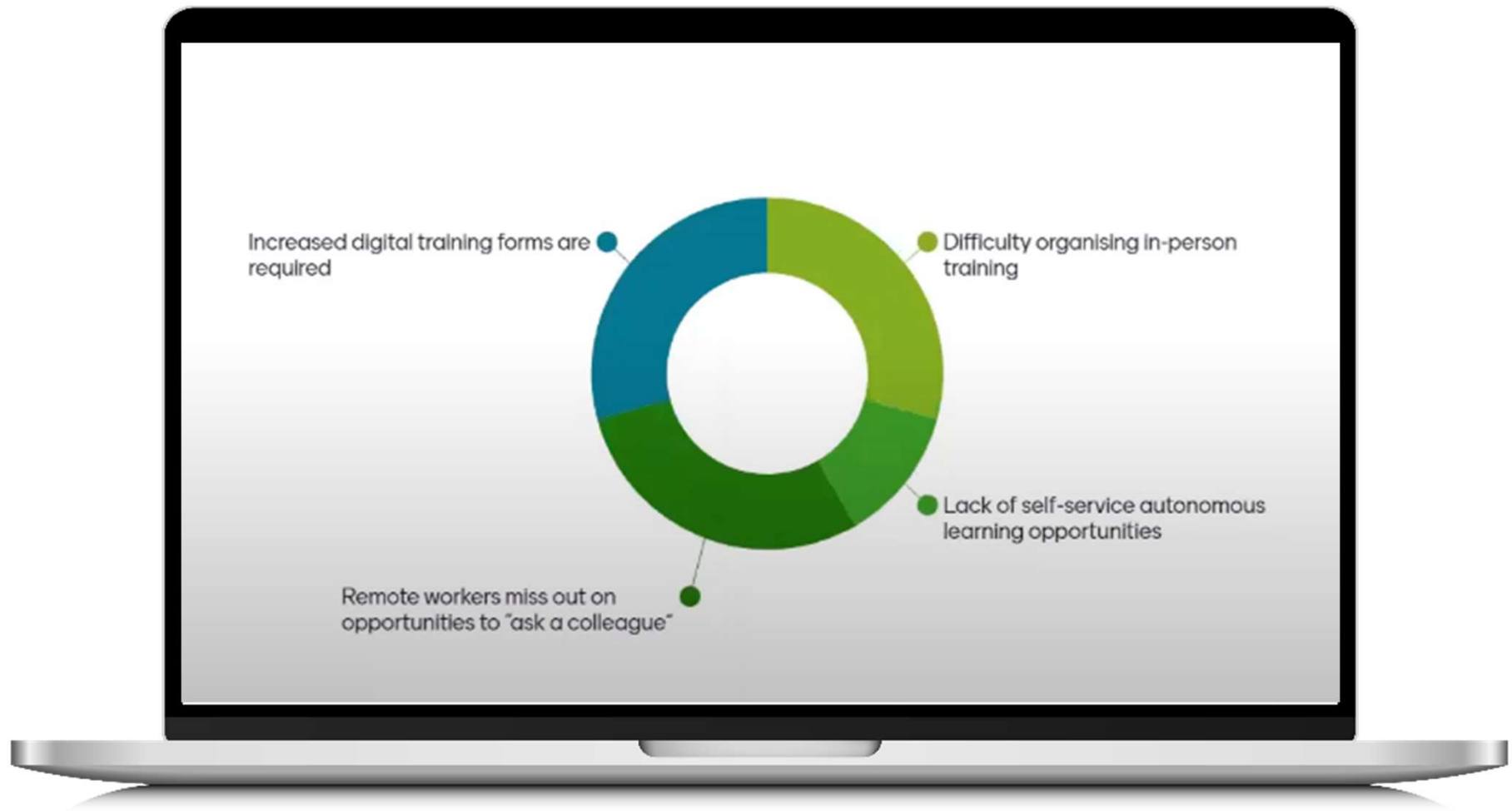- Fluid drop zones, Event mapping, Forms, Fluid delegations, Alerts & notifications

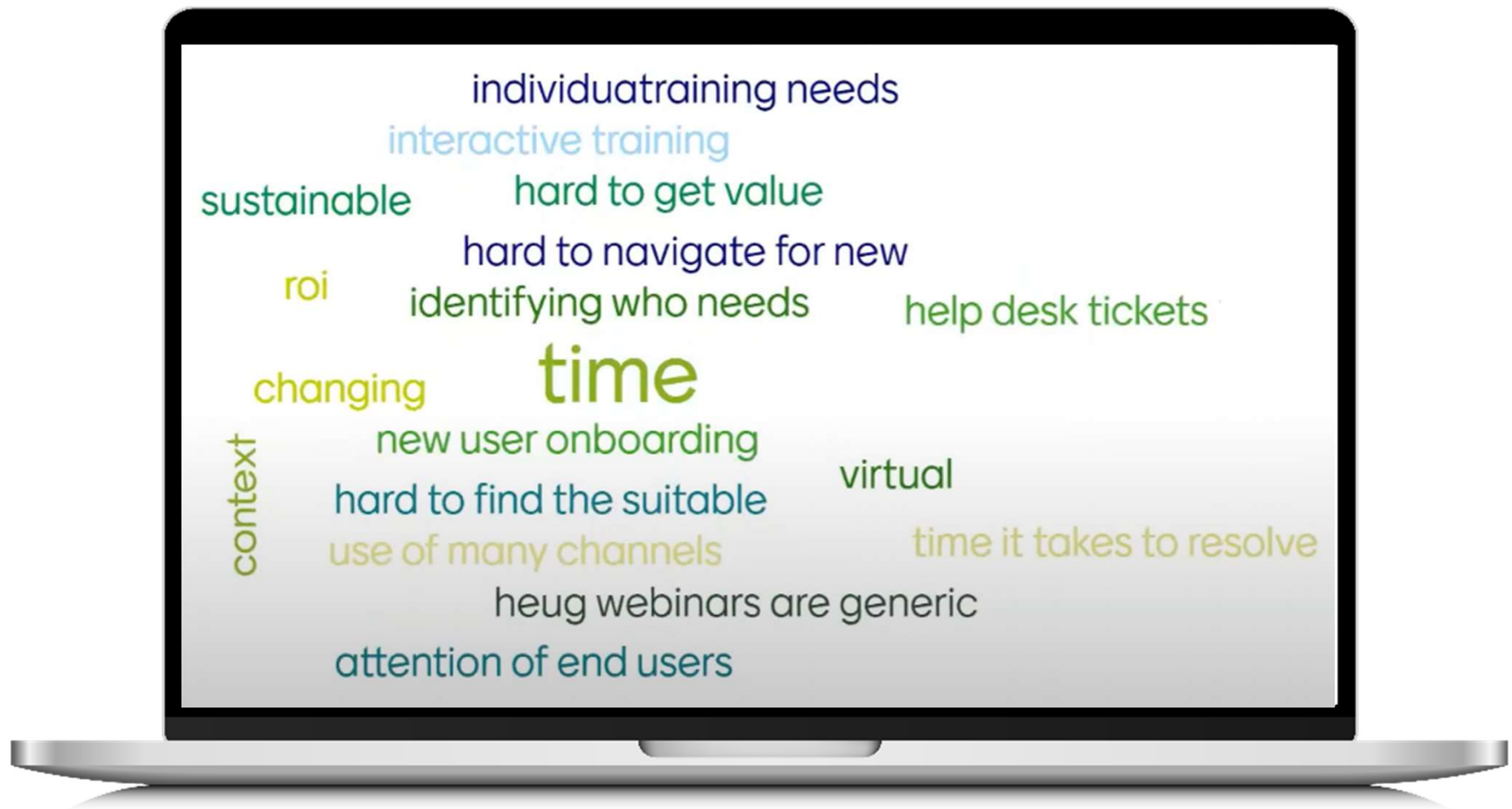Partnering with Oracle to deliver Oracle Guided Learning
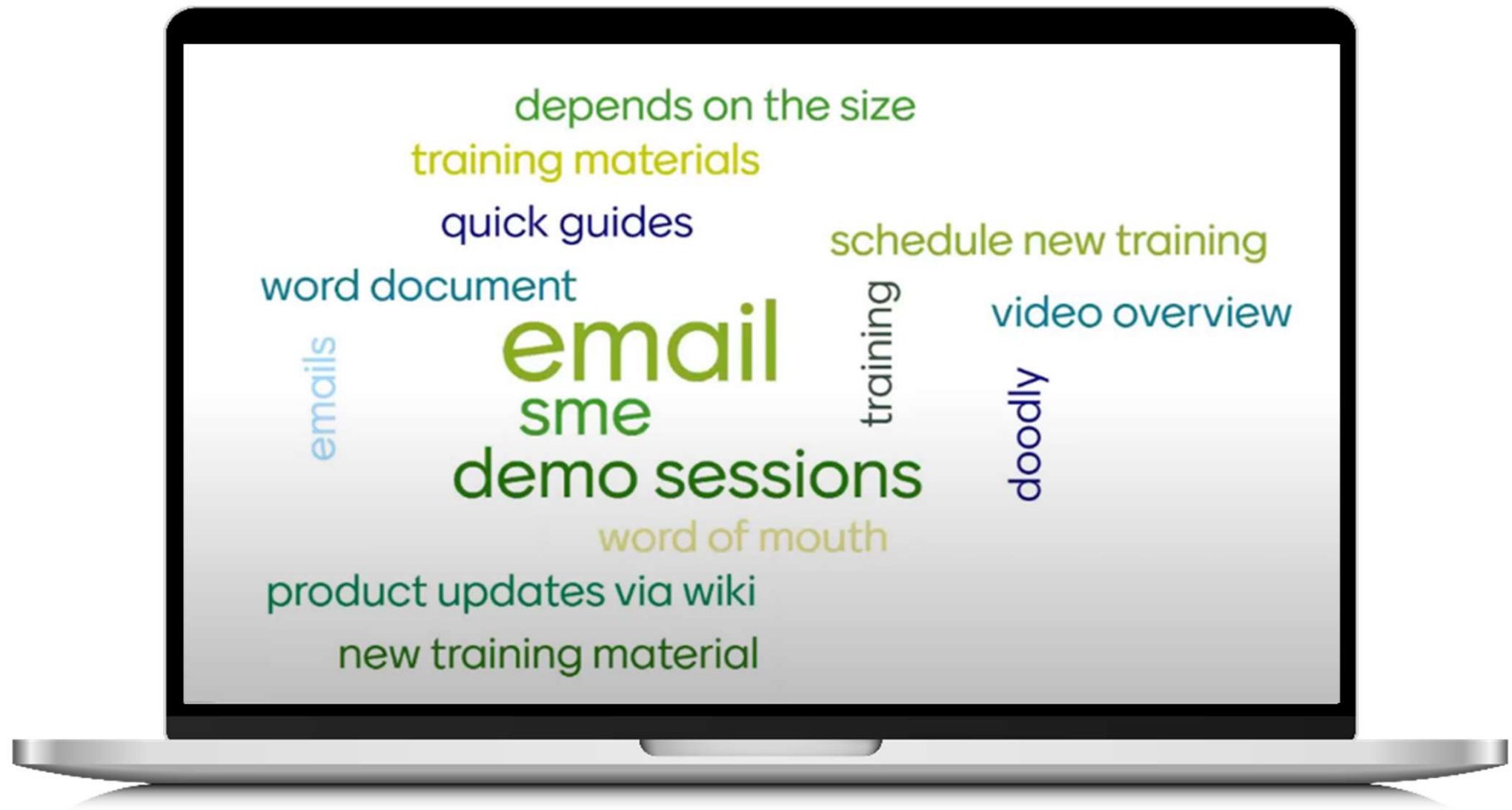
WE KNOW ADOPTION AND TRAINING CHALLENGES

How has the hybrid workplace model challenged your employee training and delivery model?

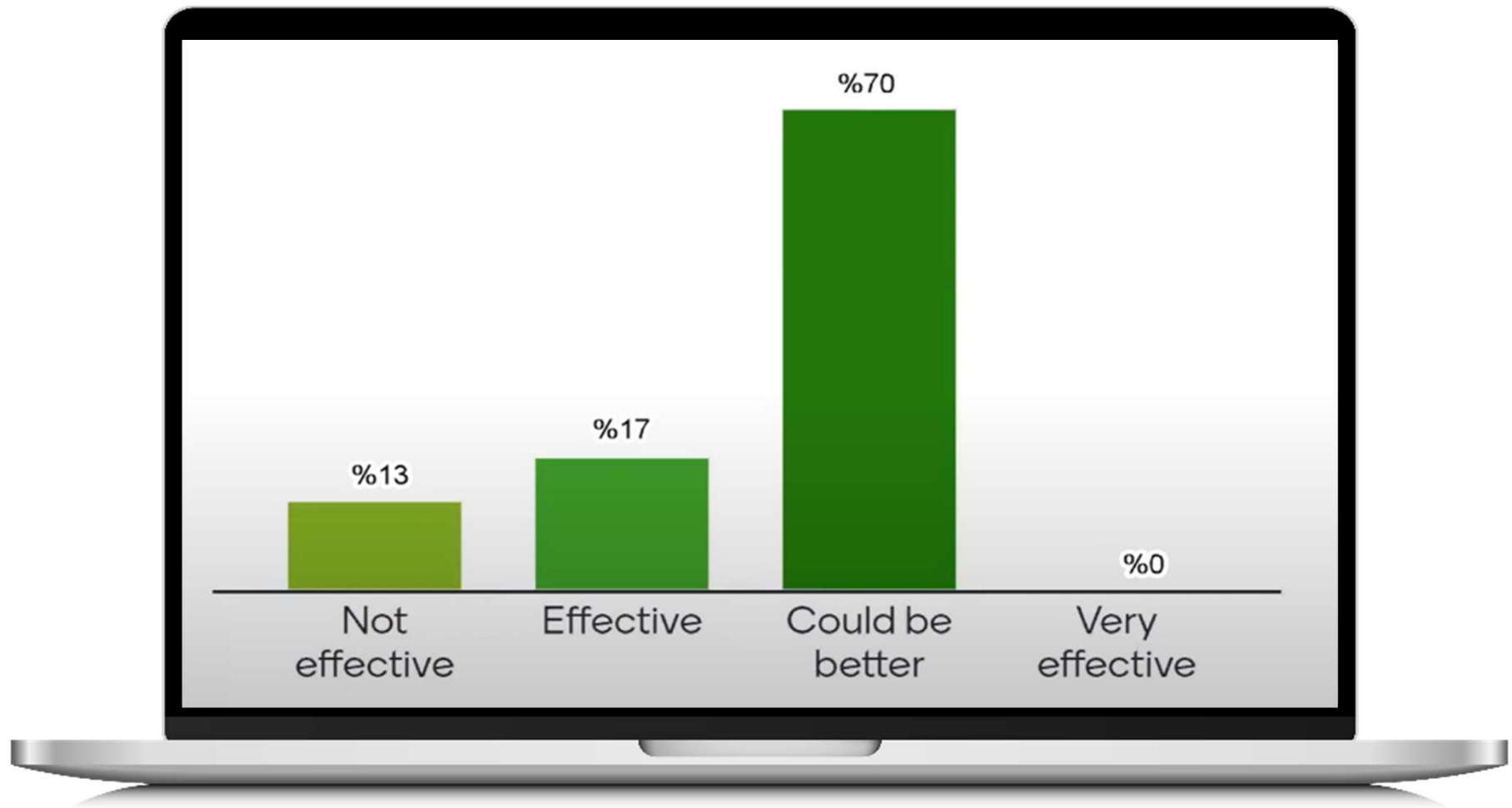What are your current training challenges for your PeopleSoft suite?

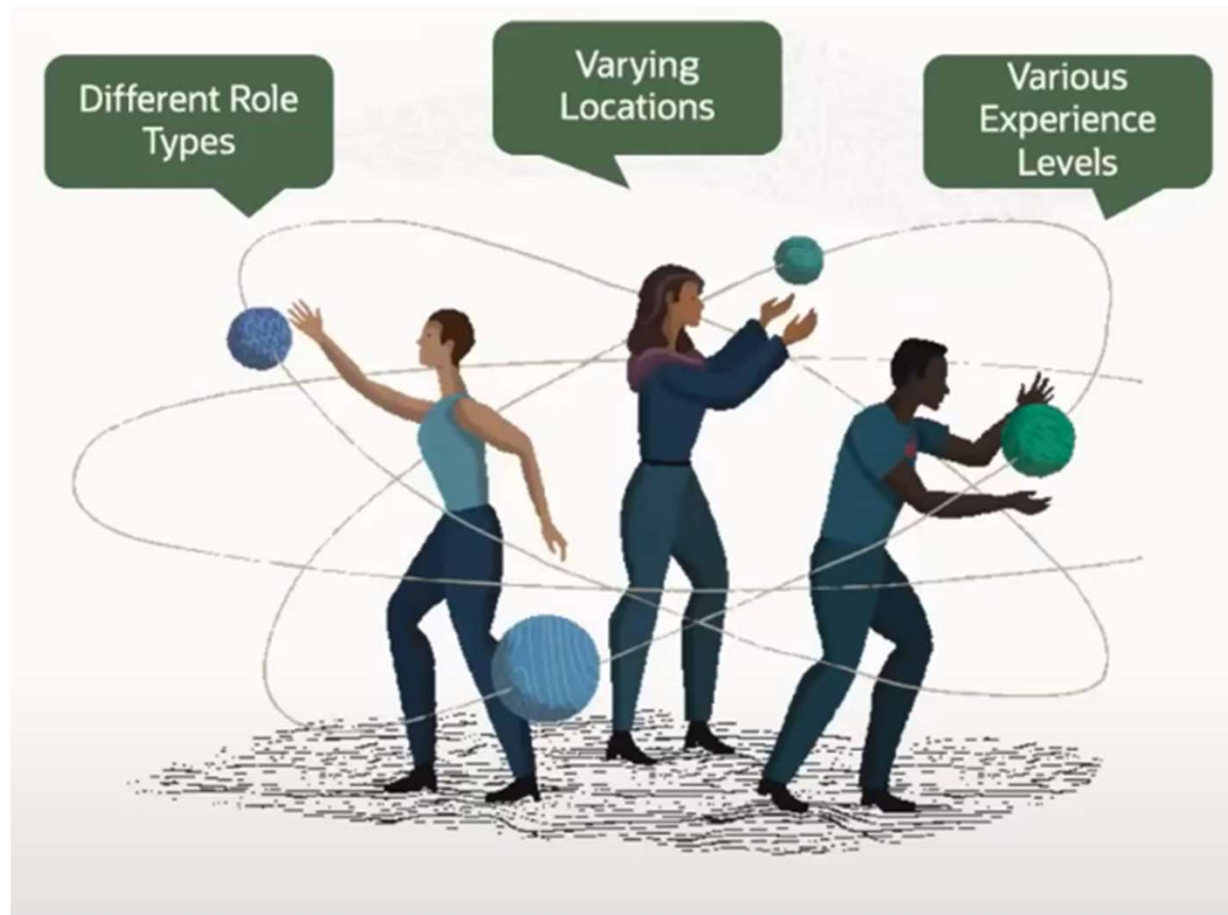How do you communicate new functionality features within PeopleSoft or more broadly across your IT applications?

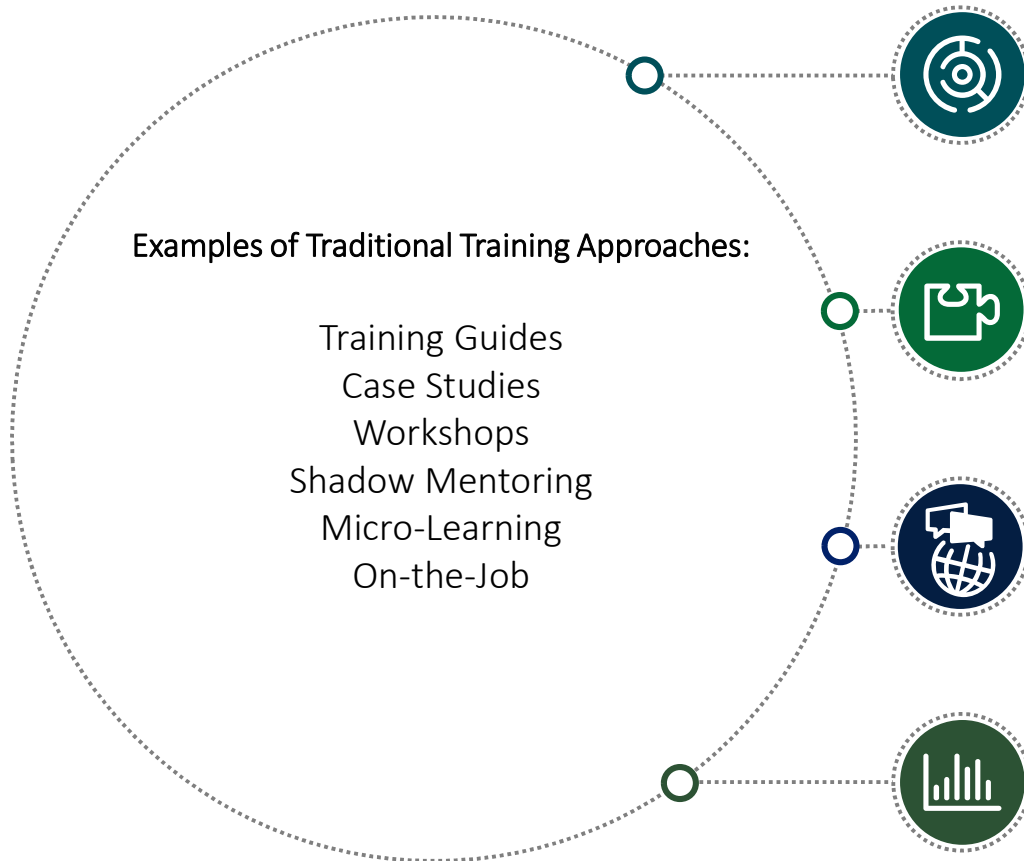How do you communicate work-related messages such as system downtime to your employees?
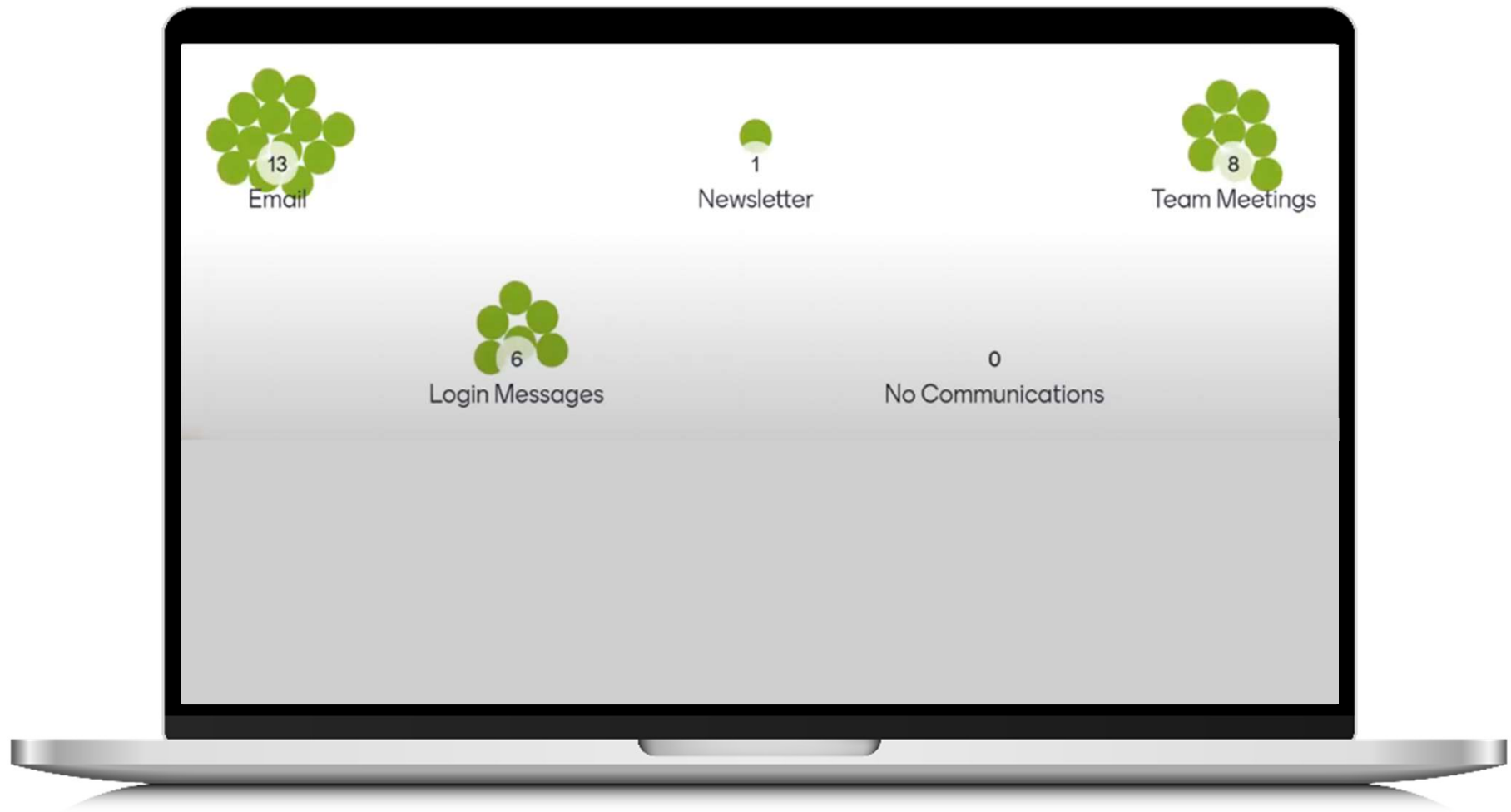
How effective do you find your communication channels?

Varied Global Audience

Challenges of Traditional Training Approach

Examples of Traditional Training Approaches:

Training Guides
Case Studies
Workshops
Shadow Mentoring
Micro-Learning
On-the-Job

No Contextual Guidance

Learners may struggle to understand how the technology concepts apply to real-world scenarios or lack specific guidance tailored to their individual needs.

Disjointed Learning and Work

Lack of integration between training programs and actual work tasks, leading to a gap in applying the newly acquired knowledge in practical settings.

High Volume of Service Desk Support

The overwhelming number of user inquiries and technical issues that strain the support team's resources and hinder efficient problem resolution.

Lack of Analytics

Absence or limited availability of data-driven insights and analysis regarding the effectiveness of training programs.

Human Factors that Determine Return on Investment (ROI)

Speed of Adoption

How quickly are people up and running on the new systems, processes and job roles?

Ultimate Utilisation

How many people are using the new solution?
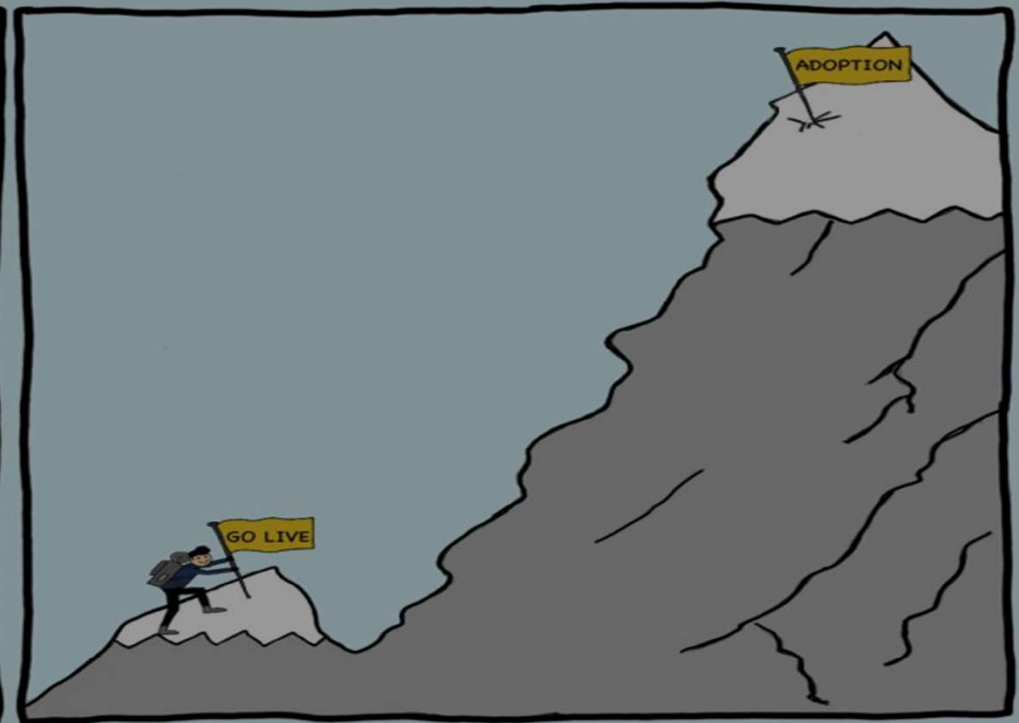

Proficiency

How well are individuals performing compared to the level expected in the design of the change?

Plan With The End In Mind!

EXPERIENCE MATTERS

New employee

- Is highly motivated to make an impact

- Has expertise and knowledge from previous organisation/role which may not align to your processes and policies

- Their success is highly reliant on the initial training and onboarding experience

Typical Onboarding Habits and Observations

- Manager will take primary responsibility for their onboarding

- New employee will be given a 'training/onboarding plan' and expected to complete this

- New employees won't be 'productive' for a few weeks. The realization of the investment in the employee won't be seen for ~1-3 months.

Onboarding Challenges

- Managers need to decide how much time to allocate to their new employees for training often at the cost of business activities

- Information overload – new employee takes hours, days, and weeks of training leaving them burdened by their training period

- Employee is not 'productive' in the first few weeks

Deloitte: Your Partner on the Path Forward

What Would It Look Like With Oracle Guided Learning?

Deloitte: Your Partner on the Path Forward

What Would It Look Like With Oracle Guided Learning?
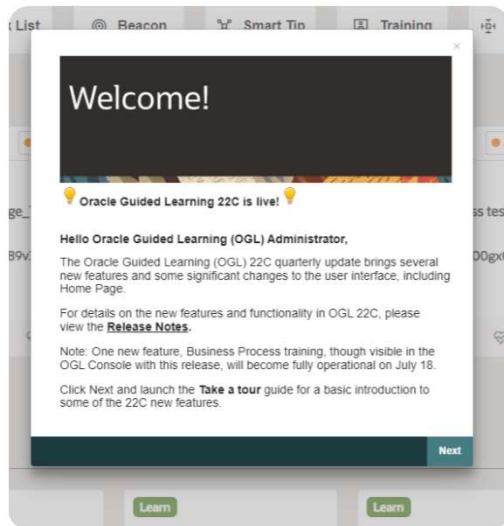
Deloitte: Your Partner on the Path Forward

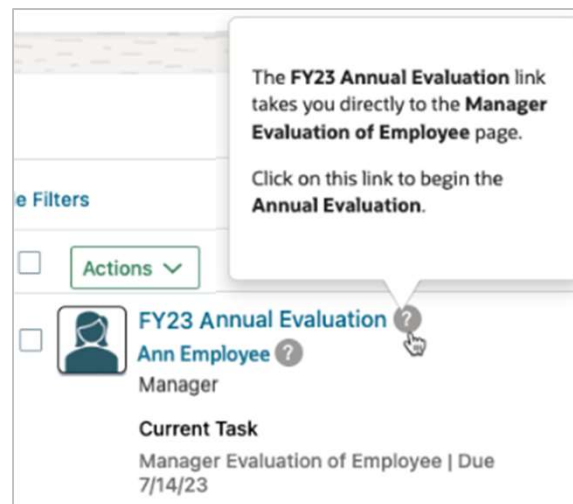# Common Use Cases For Oracle Guided Learning

Go-Live and Change Communications

Schedule for every release, (business or product) customize delivery by role, region, application


Prevent human errors and increase ROI

Deploy tips across common business process issue, prevent users from entering incorrect data and arm your support teams to use OGL guides when helping users
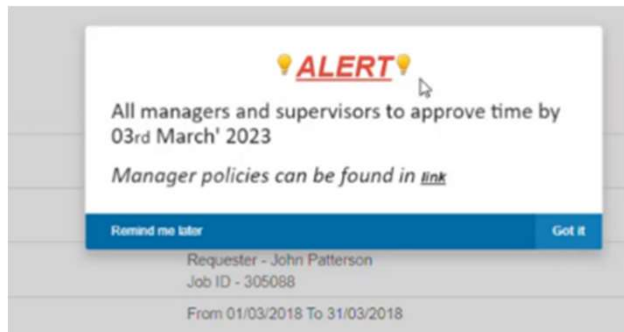

New and infrequent employee training

When a new employee joins, use OGL to provide them a tour of your application to help them orient quickly

Deloitte: Your Partner on the Path Forward
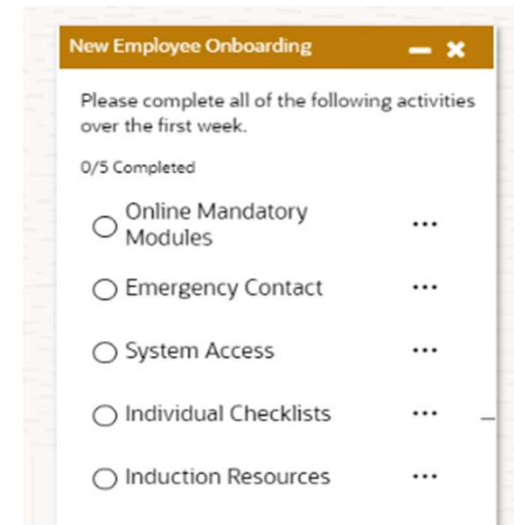
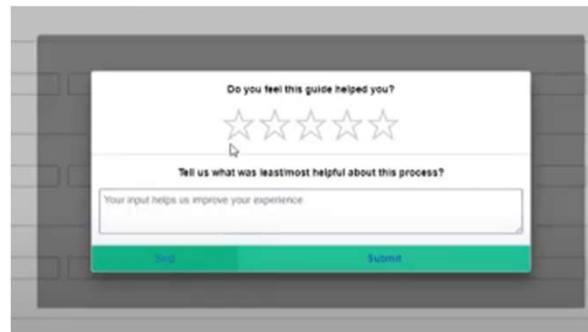# Common Use Cases For Oracle Guided Learning

Remind users of important deadlines
Remind relevant end users of important dates to proactively address missing deadlines
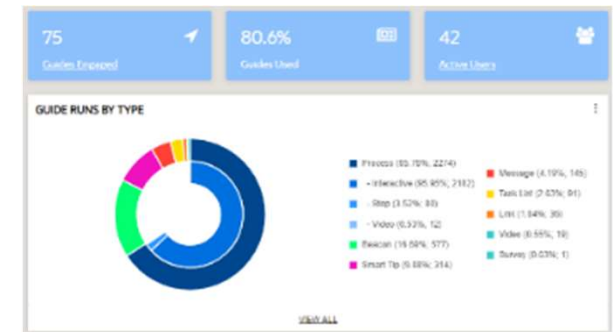
Create a feedback channel
Include feedback surveys at the end of the guides to create a reliable 2-way channel of communication with end users, helping you optimize the guides quality.

Have insight into user behavior
You can confidently measure success and address user issues where pain points are identified.

Deloitte: Your Partner on the Path Forward

Oracle Guided Learning Accelerates Your Digital Adoption

───── **B E N E F I T S** ─────

**FAST - Maximise the speed of adoption and ultimate utilisation**
Provide in application and context sensitive best practice step-by-step guidance for end users in the flow of work.

**EFFECTIVE - manage continuous change**
Equip change managers and learning developers to be more efficient by leveraging pre-built guides and mechanisms for communicating change

EMPOWER – Satisfy users at the point of need
Embed unique business rules, policies, naming conventions and messaging in application, in the users flow of work
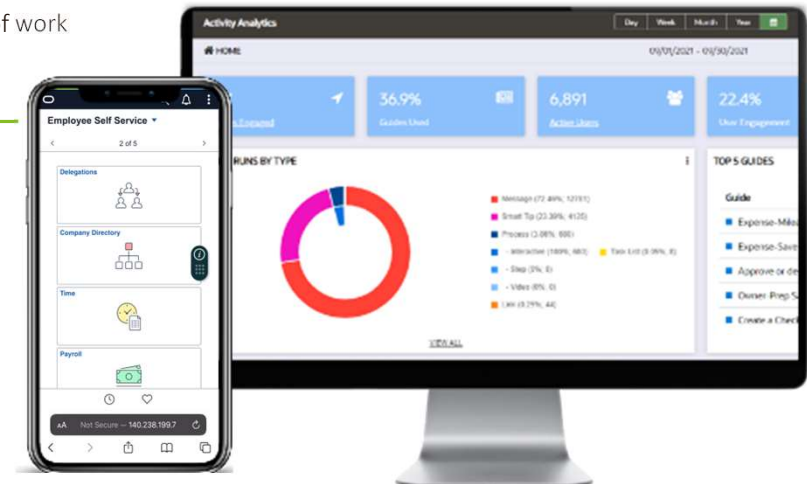
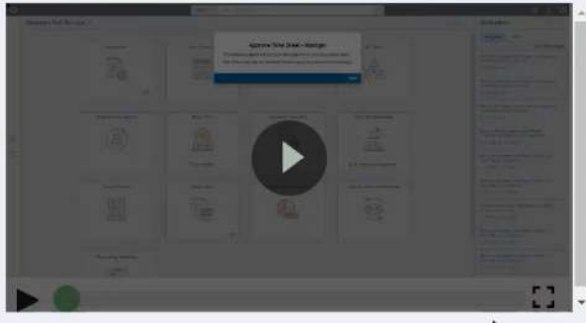LET'S SEE ORACLE GUIDED LEARNING IN ACTION
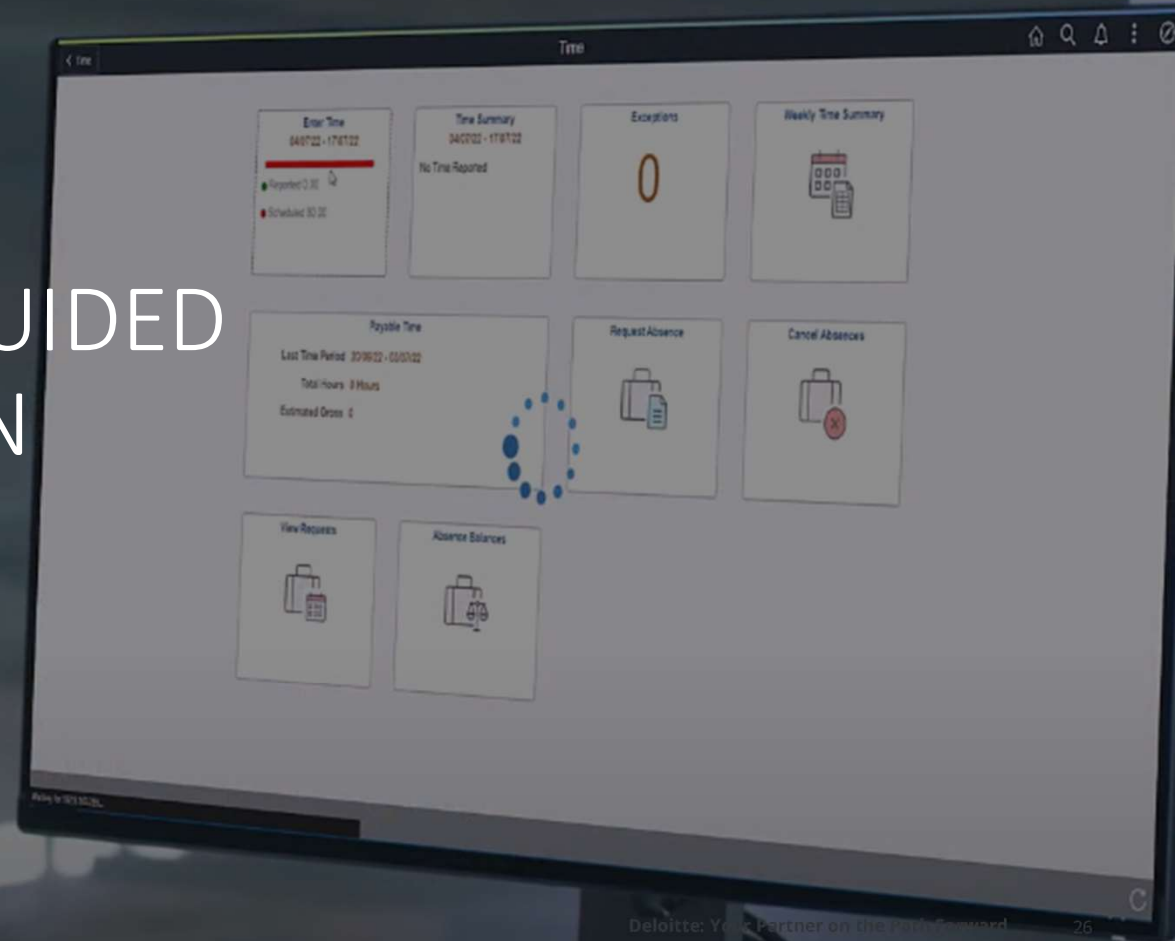
ORACLE GUIDED LEARNING
PROCESS GUIDES VS. SMART TOOLS

Oracle Guided Learning – Process step Guide

Visually walk users through a process, providing step-by-step guidance to help through a task.
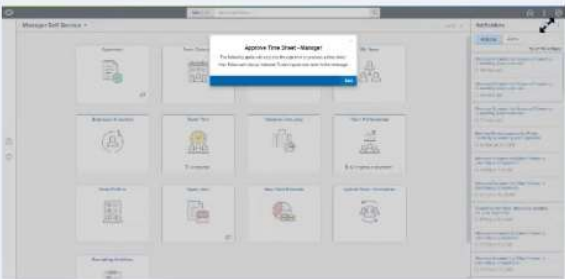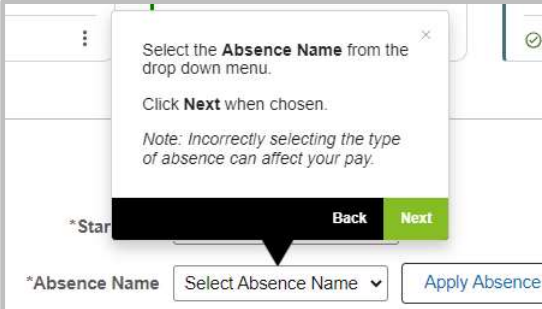
Guides automatically create walkthrough videos for easy watching

Guides can be exported as PDFs for printing and sending which includes the steps and screenshots of each step.

Example step tip

Oracle Guided Learning Features – Smart Tools

Smart Tips
Context-sensitive help supplementing information to UI elements.
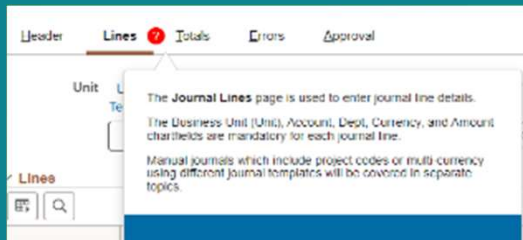
Feedback
Comments and ratings directly from users about guides.
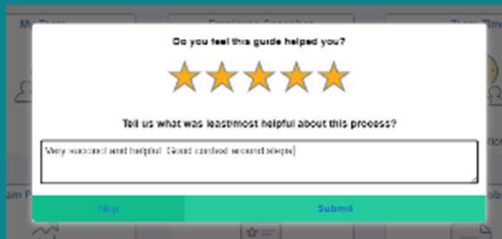
Task Lists
Group guides together into a structured order for users to complete.
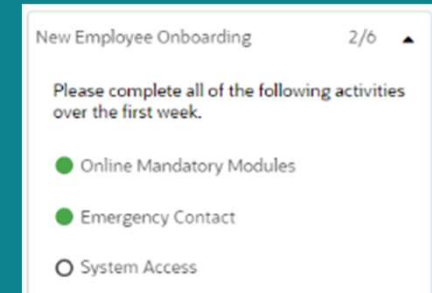
Beacons
Pulsing animation to draw attention for emergency or temporary notifications

Widget
Used to activate the OGL window and use OGL tools

Messages
Call out important messages and even include links to external sites

Process Guides VS. Business Process Flows

Application Process Guides

Application Guides address the tasks in one or more of the business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organised by the business process model activities and tasks.

Business Process Flows

Business Process Flows address the tasks required to set up or select features. They are intended for Subject Matter Experts. They are organised to follow the task list sequence and can be tracked like training.
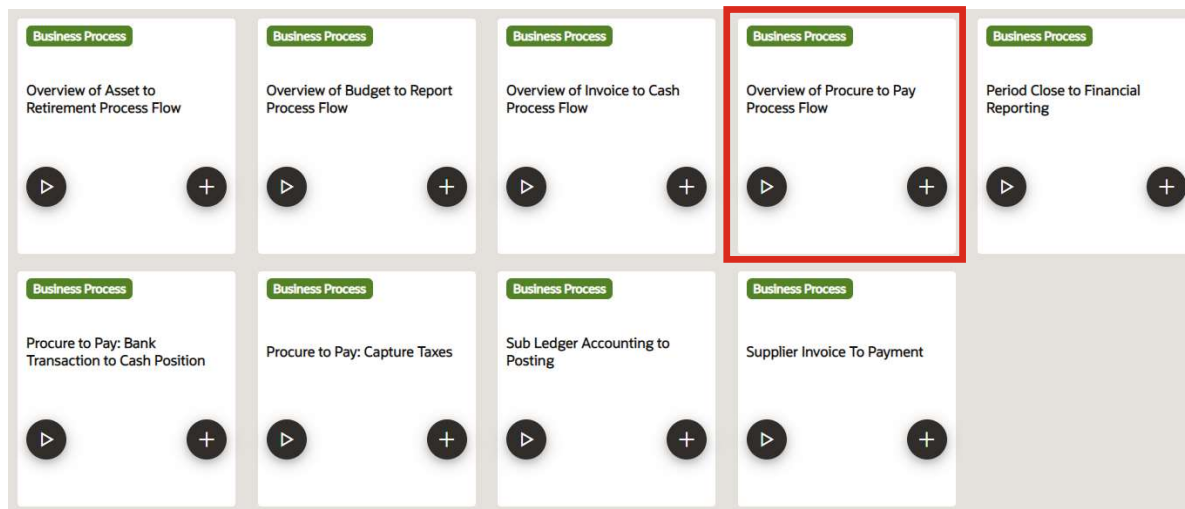
Oracle Guided Learning Across Project Phases

| FOCUS/*Initiate* | REFINE/*Define* | ENABLE/*Execute* | LIVE-OPERATE/*Maintain* |

Key Enablement Activities

Project Team Enablement Level → **End User Enablement Level** →

1. Familiarisation
2. Learning Explorer / Cloud Learning Subscription
3. Process Playbacks
4. Final Validation (SIT)
5. End User Training
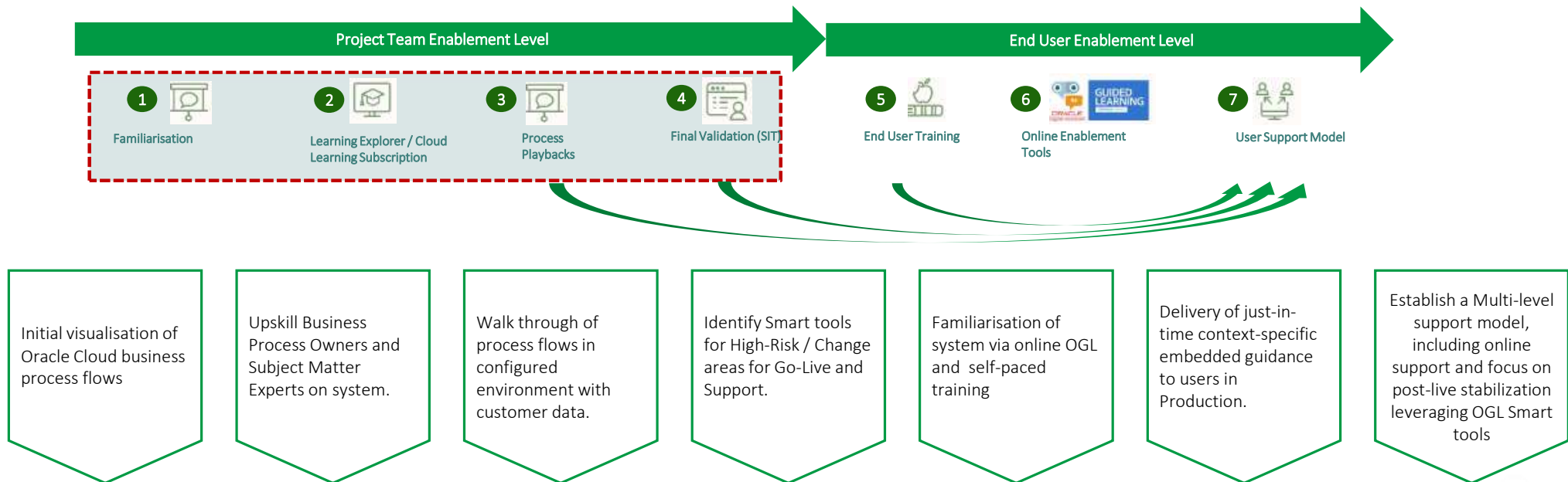6. Online Enablement Tools
7. User Support Model

Initial visualisation of Oracle Cloud business process flows	Upskill Business Process Owners and Subject Matter Experts on system.	Walk through of process flows in configured environment with customer data.	Identify Smart tools for High-Risk / Change areas for Go-Live and Support.	Familiarisation of system via online OGL and self-paced training	Delivery of just-in-time context-specific embedded guidance to users in Production.	Establish a Multi-level support model, including online support and focus on post-live stabilization leveraging OGL Smart tools

Procurement: Targeted Guidance: Single Smart linked to guides

Manage Requisitions

◢ Search

Welcome to the Manage Requisitions Page

On the Manage Requisitions page you can:

- Search for requisitions
- Check purchase order status
- Edit orders
- Duplicate orders
- Reassign orders to new owners
- Export requisitions to excel

Note: The status of your Requisition will determine what you can do with that Requisition.

Look out for Smart Tips on the page with useful information.

Need help with completing a process?

Open the guided Learning widget at any time and click on a process name to launch an interactive guide or use the search bar to find what you are looking for.

Search Results

Actions ▼ View ▼ Format ▼

Requisition	Des
204088	1TB
204087	1TB

New to Procurement?

Click on the link below to take the Tour.

Procurement Tour

Need Help with Navigation?

You can get real time guidance with completing Purchase Requisitions. Click on a link below for help to do this now.

Create Requisition from Catalog

Create Requisition using Smart Forms

Create Noncatalog Requisition

Remember you can get help with navigation at anytime by selecting a wide range of guides in the Help widget.

What would you like to do today?

Duplicate a Requisition

Cancel a Requisition

Delete a Requisition

Edit a Requisition

Reassign a Requisition

Use case - Customer Procurement focus areas

Requisitions
- Mandatory Fields
- Role Alignment
- Change of dates after approval
- Internal Requisition days
- Amend Requisition – steps

Purchase Orders (Pricing, Changes, Closure)
- Seeing my PO
- Change my Pricing
- UOM change
- Labour – draw down (Contractors)
- PO Closure

Quotes
- Default dates
- Mass Updates

Inventory
- Understanding status
- Buying something internally

WO completion - Maintenance team
- Back Order (WO) still outstanding in inventory
- Updating completion

Receipting
- Un-Receipting
- Fully receipting
- When approvers are on leave

RCTI
- Over/under paid
- Fixed Price issues
- Supplier Master – multiple orders

Accounts Payable
- Breakdown of parts
- Matching
- Quantity changes

Elastic Search
- Searchable
- Error code messages

Use Case - Customer Procurement Mandatory Fields

Field	Description	Deployed OGL content
Item Description	**Item Description:** This is the individual Line-Item Description.	Smart pop-up
Category Name	**Category Name:** Click on the magnifying glass and click search (do not enter any search criteria) to see a full list of Category Names.	Smart pop-up
Supplier	Supplier : Type in the required supplier or click on the magnifying glass and search for the desired supplier.	Smart pop-up
Supplier Item	Please Enter the supplier item correctly	Smart tip
Review option in the shopping card	Click on Review to edit or review the shopping cart	Smart tip
Attachment	Attach the required quotation/invoice related to this requisition	Beacon
Delivery information	Urgency : If this requisition needs to be delivered on priority, please select "Yes".	Smart tip
	Delivery Date : Select the required delivery date. If you have selected as "Yes" above.	Smart tip

Oracle Guided Learning Benefits

BENEFITS

Since OGL is overlayed directly on the applications, users get access to the support they need exactly when they need it.

Accelerate time-to-competency during implementation, onboarding, and role changes

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

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

Continuously updated through cloud releases and business process changes with minimal disruption to end users

Ensure compliance by maintaining guided material to only display the most current processes/procedures

Ensure data integrity and efficient processing through in-application tips, best practices, and guidance
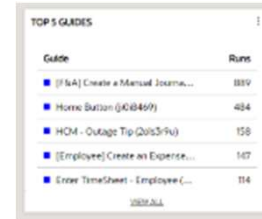
MEASURING SUCCESS

Measuring Success – Insight Into How People Work

BENEFITS

Visually walk users through a step-by-step process with **process guides**

Context-sensitive help for supplemental UI information with **smart tips**

Analyse user satisfaction and where content can be improved with **feedback**

Group guides into a clear, structured order for users to complete with **task lists**

Filter and report on OGL metric information to obtain valuable insights with **analytics** and its custom **dashboard**

Guides used; guides **viewed**

Unique users
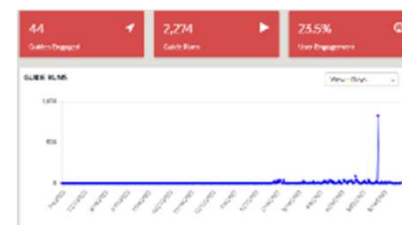
Top trending **guides**

ANALYTICS DASHBOARD IN ACTION

Top trending guides

Comments & ratings on specific guides

Total guides run

Guides run by type

Oracle Guided Learning Improves User Experience And Increases Business Confidence

A R E A S

MAKING UAT EASIER
- Deploy messages in-application to relay critical communications to UAT testers

- Deploy a variety of smart-tips and beacons to help UAT testers navigate through business processes.

GO-LIVE WITH CONFIDENCE
- Guide users through critical business processes with and Step Guides

- Provide a one-stop shop resources support by collating all materials in-application via the OGL Help Widget

MANAGE CONTINUOUS CHANGE EFFICIENTLY
- Deploys in-app communication to users as they log into their work – avoiding lost communications

- Tracks user acknowledgements and effectiveness of communications through robust analytics.

Accelerator we'll bring to 'jumpstart'

Our Service Offerings

Choose from an already existing of library of guides. We complete a fit-gap of the OGL guides against your organisation and business requirements to tailor specific guide

Sample Available OGL Guides for PeopleSoft HCM

Workforce Administrator	Manager	Employee
✓ Create a query	✓ Approve timesheet	✓ Enter timesheet
✓ Run a query	✓ ePerformance	✓ Submit an absence request
✓ Pay-run	✓ Approve delegation	✓ ePerformance
✓ Job data change	✓ Annual performance cycle	✓ Update emergency contact
✓ Add employee		✓ Update address
✓ New employment instance		✓ Add employee phone
✓ Calculate absence and payroll		✓ Create delegation
✓ Review payroll results		✓ Approve delegation
✓ Maintain job data		✓ Update details

Thank You For Taking The Time To Join Us Today!

If you wish to explore OGL for your PeopleSoft systems further, please reach out and we can organise a more customised demo for your organisation.

Shirin Jamarani – Digital Adoption Specialist
sjamarani@deloitte.com.au