

A light gray world map is centered in the background. An orange target icon, consisting of a solid orange circle with a white ring, is positioned over the eastern coast of Australia. 

# **De-Customize and Get Current**

**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

- 1) Introductions
- 2) Current State of PeopleSoft
- 3) Application Designer
- 4) De-Customization
- 5) Customization Use Cases

# 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

**ORACLE** | 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.

**ORACLE** | Expertise in PeopleSoft in North America

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

**ORACLE** | Expertise in Oracle EPM Cloud in North America

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

**ORACLE** | 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.

**ORACLE** | 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.

**ORACLE** | 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

**Gartner**<sup>®</sup>

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

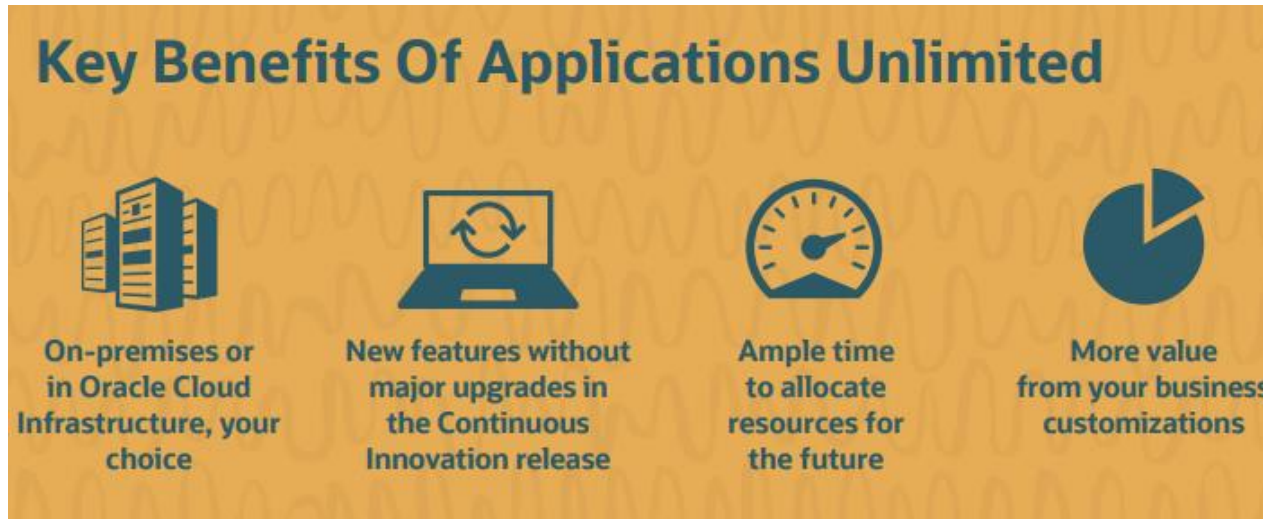




# Current State of PeopleSoft

# Oracle PeopleSoft Roadmap

- Oracle has committed to a rolling 10 years of Application Support and Continuous Innovation.






<https://www.oracle.com/a/ocom/docs/support/apps-unlimited-letter.pdf>



# Oracle PeopleSoft Roadmap

## Strategic Investments

-  Simplification and modernization
-  Analytics
-  Cloud and emerging technologies
-  Frameworks to eliminate customizations

ORACLE  
PeopleSoft

## Customer Driven Enhancements

- ✓ Product-specific features
- ✓ Business process capabilities
- ✓ 175+ features sourced from the Idea Spaces on My Oracle Support

# PeopleSoft Update Manager (PUM)



Continual Improvement through PeopleSoft Update Manager



4 images per year including Bug Fixes and Enhanced Functionality (Features)



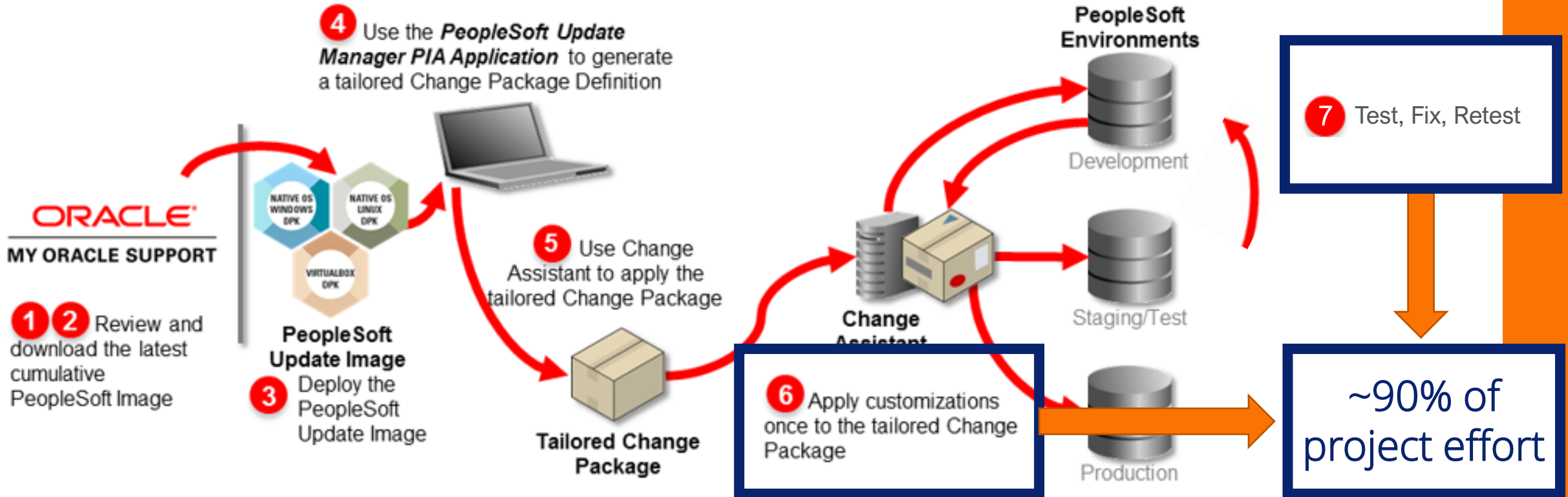
Adhoc Patching & Regulatory Updates (Tax Updates, 1099, etc.)

# PeopleSoft Update Manager (PUM)



## PeopleSoft Maintenance

Lifecycle Management with PeopleSoft Update Manager





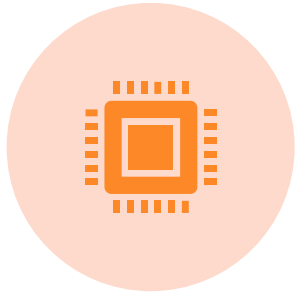
# PeopleSoft Update Manager (PUM)

**Customization Retrofitting and Long Test Cycles are the number 1 reasons Organizations don't (can't) stay current.**

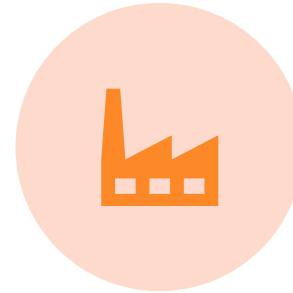
# How did we get here?

## Or... a Brief History of PeopleSoft Development

# PeopleSoft History



Version 1 released in 1989 as the first fully integrated, client-server HRMS application suite.



Expansions to Financials in 1992, Distribution in 1994 and Manufacturing in 1996.

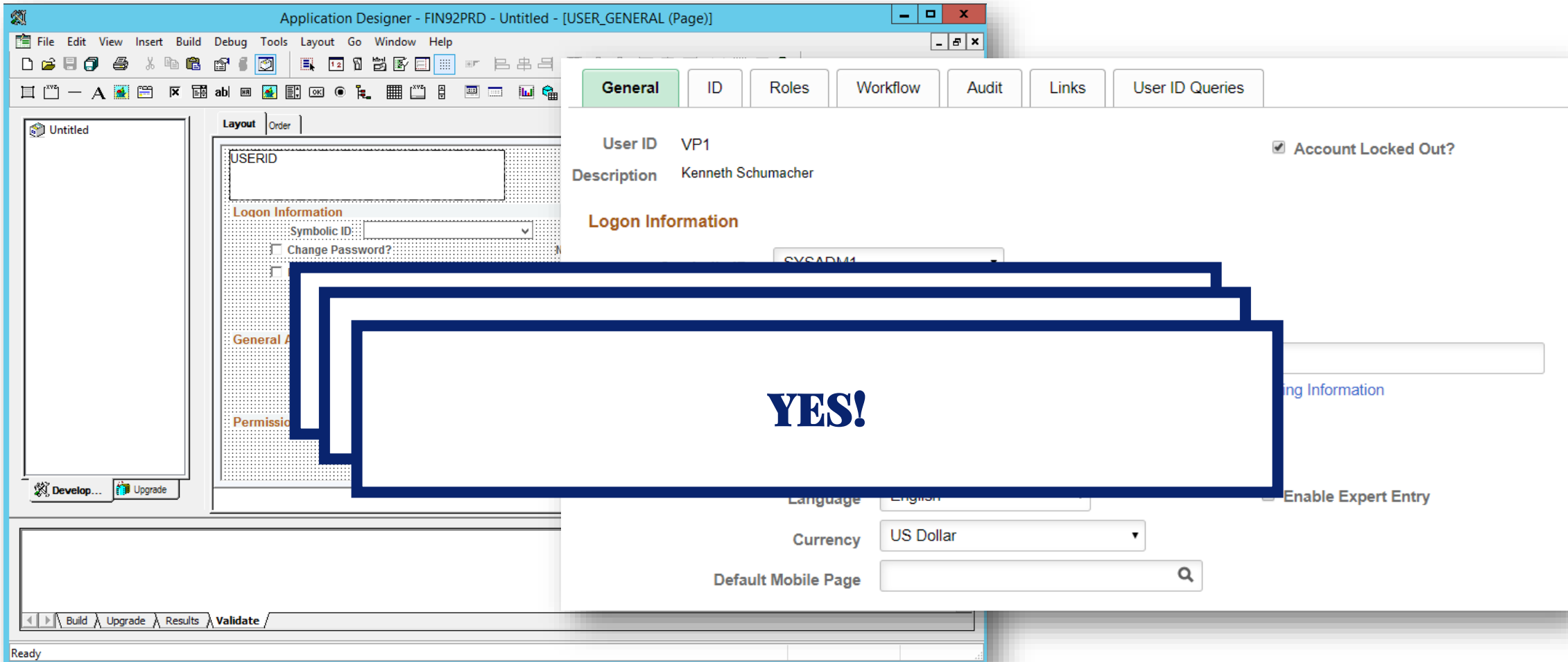


Proprietary software (PeopleTools) built as open source.



Platform independent

# Application Designer – The Enabler!



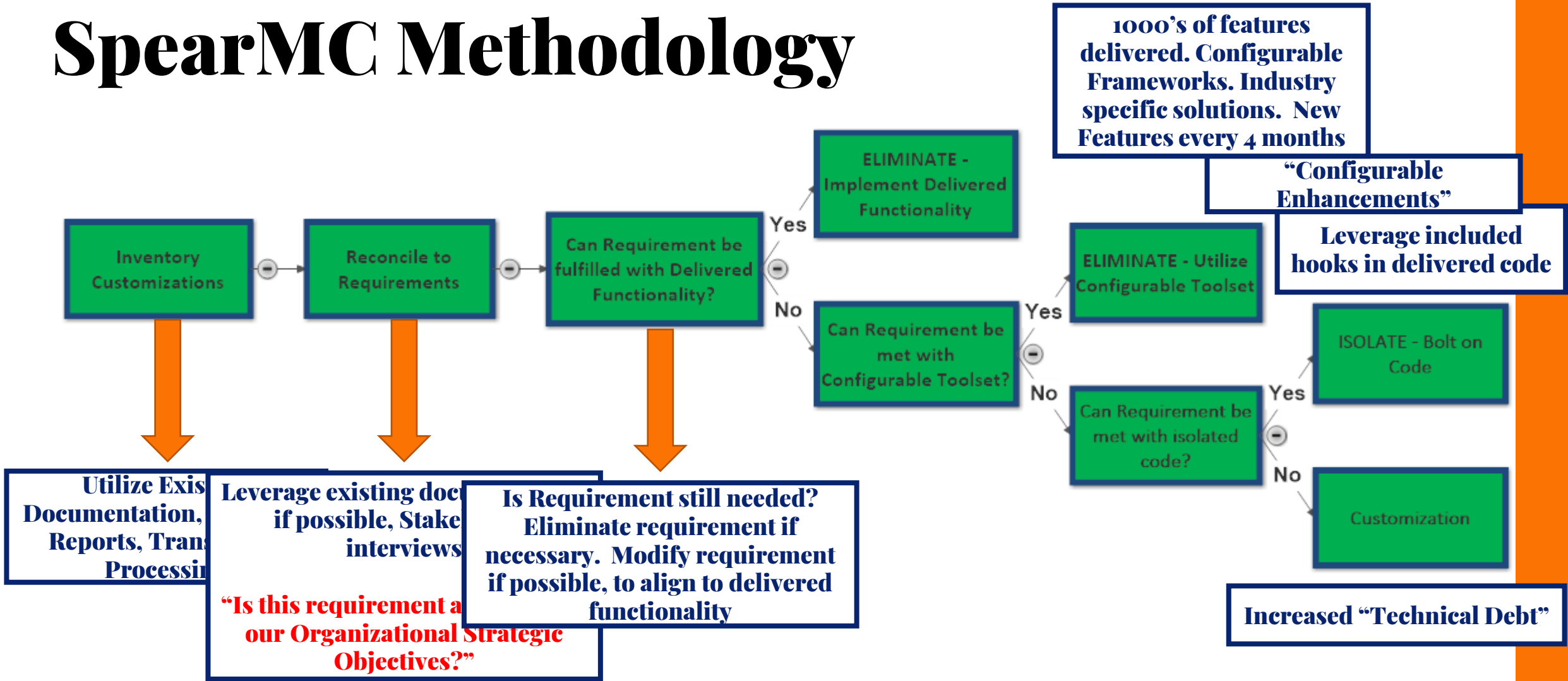
# Application Designer – The Enabler!

*Strength, taken to an Extreme, can become your Weakness!*



# De-Customization Analysis

# SpearMC Methodology



# Why Do We Customize?

# Customization Use Cases

Organization-Specific Terminology, Defaulting of Values, Required Fields, Hide Fields, Data Masking

## OLD:

- Field Relabel
- PeopleCode
- Page Modifications
- Security Restrictions



## NEW:

- Page & Field Configurator
- Data Privacy Framework
- Event Mapping

# Page and Field Configurator

< Cameron's Homepage

Project Activity

General Information

Definition

EA Rates

Location

Attachments

Quality

User Fields

Rates

Budget Alerts

>

Project000000000000163

DescriptionThe effects of insulin on labo

ActivityNEXT

\*Description

Activity Type

System SourcePPC

Activity Owner

Percent Complete0.00

Processing StatusActive

Activity Schedule

\* Start Date01/14/2012

Duration in Days0

\* End Date01/14/2012

Deadline Date

Create Predecessors

Constraint Type

Baseline Start Date

Baseline Finish Date

Early Start Date

Early Finish Date

Actual Start Date

Actual Finish Date

Late Start Date

Late Finish Date

Description

1 of 1

View All

Date/Time Stamp04/29/20 12:42:46AM

User IDCMCCLURG

+ -

Description

254 characters remaining

Before



# Page and Field Configurator

< General Information

Project Activity

General Information

Definition

FA Rates

Location

Attachments

User Fields

Rates

Budget Alerts >

Project

000000000000163

Description

The effects of insulin on labo

Activity

000000000000001

\*Description

TEST

Activity Type

BUILD

Build

Percent Complete

0.00

System Source

PPC

Processing Status

Active

Responsible Party

Activity Schedule ?

After

\*Start Date

01/14/2012

Duration in Days

0

\*End Date

01/14/2012

Deadline Date

Create Predecessors

Constraint Type

Description ?

1 of 1

View All

Date/Time Stamp

04/29/20 12:40:33AM

User ID

CMCCLURG

\*Description

254 characters remaining

# Page and Field Configurator

[< ChartField Values](#)

Department

SetID SHARE

Department 10000

Effective Date

1 of 1

View All

\*Effective Date

01/01/1900

\*Status

Active

\*Description

Human Resources

\*Short Description

HR

Manager ID

KU0079

Company

Attributes

Long Description

+

-

Before

☐ Budgetary Only

Manager Name

Ball,Nancy

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct History

# Page and Field Configurator

< ChartField Values

Department

SetID SHARE

Department 10000

Effective Date

Q

|

<

<

1 of 1

>


>

|

View All

\*Effective Date

p1/01/1900



\*Status

Active

▼

\*Description

Human Resources

\*Short Description

HR

Manager ID

XXXXXX

Manager Name

XXXX,XXXXX

Company

Q

Attributes

Long Description

+

-

☐ Budgetary Only

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct History

After

Manager ID

XXXXXX

Manager Name

XXXX,XXXXX

# Page and Field Configurator

When Prompt Masking is enabled, only authorized users can view sensitive fields in prompt records.

Delegation Transaction Setup

Page and Field Configurator

Masking

User List

Map to Portal Registry

Component Name

BANK\_BALANCES

Market

Global

Configuration Type

Masking

\*Description

\*Status

Active

Validate Configuration

Review Sequence Processing

Criteria

1 of 1

View All

Sequence Number

1

Description

Status

Active

+ -

Criteria

No Criteria Defined.

Define Criteria

Copy Criteria From

Apply Additively

Configure Masking

Source Type

Search and Prompt Fields

Select Fields

Configure Field

Page Fields

Search and Prompt Fields

Record Name

Field Name

Mask Field

Mask Profile

Profile Status

Bank ID	Bank Name
XXXXXXXX4567	State Bank
XXXXXXXX4093	Royal Bank of Canada

# Page and Field Configurator

Page Configuration

User List

Map to Portal Registry

Component NamePROJECT\_ACTIVITY

MarketGlobal

LevelHeader Level

Configuration TypeStandard

AppliesToAll With Excluded Roles/Users

Excluded Roles

1-1 of 1

View All

	Role Name	Description		
1	<div></div>		+	-

Excluded Users

1-1 of 1

View All

	User ID	User Description			
1	<div>DVP1</div>	Smith,Jane	+	-	

Save

Return to Search

Add

Update/Display








# Event Mapping

- Event Mapping allows for ISOLATED code to process at the component, page or record level.
- Every time X happens, do Y
- PeopleTools – Portal – Related Content Service – Manage Related Content – Event Mapping
- HCM – Add a button to generate time report.
- FSCM – When data is entered on page, run calculation and display.
- CS – Display a message on a page with helpful information to first time users.

# Event Mapping



< Content References

Configure Event Mapping



Component Record Level Event Mapping

Map the custom application class to the Component Record level event.







1-4 of 4

View All

General

||>

Enable	Unrestricted Prompt	Record Name	Event Name	Select	Service ID	Event Map Parameter	Sequence Number	Processing Sequence		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInit		EOCC_MASK_ROWINIT		999	Post Process	+	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInsert		EOCC_MASK_ROWINSERT		999	Post Process	+	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInit		EOCC_ROWINIT1			Post Process	+	-
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DEPT_TBL	RowInsert		EOCC_ROWINSERT1			Post Process	+	-

RowDelete

RowInit

RowInsert

RowSelect

SaveEdit

SavePostChange



SavePreChange

SearchInit

SearchSave

Component Record Field Level Event Mapping

Map the custom application class to the Record Field level event.




1-1 of 1

View All

General

||>

Enable	Unrestricted Prompt	Record Name	Field Name	Event Name	Select	Service ID	Event Map Parameter	Sequence Number	Processing Sequence		
<input checked="" type="checkbox"/>	<input type="checkbox"/>			FieldChange						+	-

[Return to Event Mapping](#)

# Event Mapping

- Delivered as a Fluid Nav Collection

Manager Self Service

Configure Event Mapping

Event Mapping Services

Event Mapping Configuration

\*Search ByContent Reference

Content Reference Label

SearchAdd Configuration

9 rows

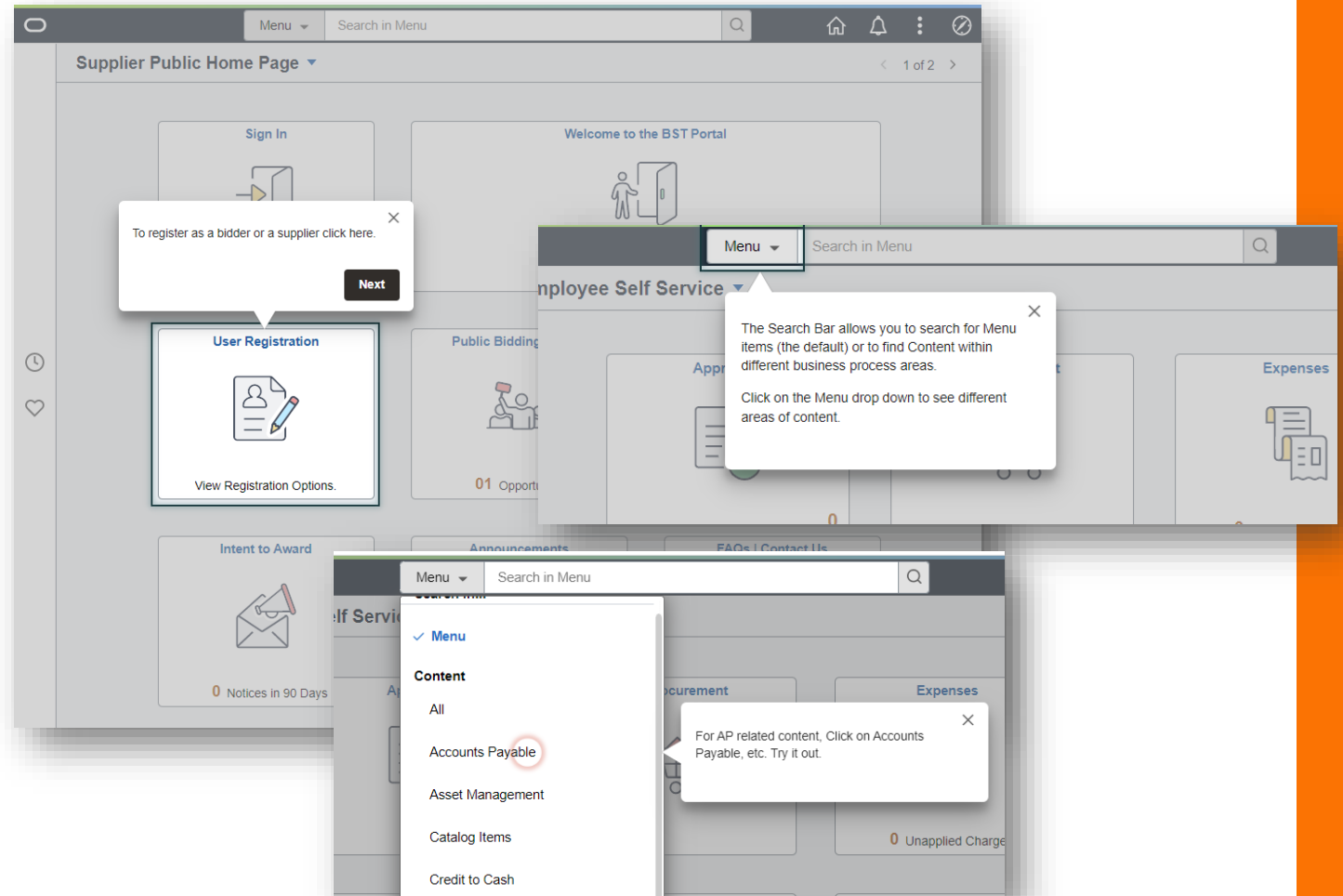
	Content Reference	Edit	Remove	Navigation
1	Dependent Information			>
2	Create/View Personnel Action			>
3	Job Data Fluid			>
4	Manage Job			>
5	Modify a Person			>
6	Maintain Bank Accounts			>
7	Fluid Home			>

# What is Oracle Guided Learning (OGL)

## In-application guidance in PeopleSoft without App Designer code

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.



# Customization Use Cases

## Organization-Specific Data (Entry) Needs

### OLD:

- Page Changes
- Record Changes
- Additional Pages in Components



### NEW:

- User Defined Fields
- Activity Guides
- Forms and Approvals
- Drop Zones

# Activity Guides

× Exit

Payment Request

Next >

1

2

3

4

Summary

Supplier

Invoice Details

Review and Submit

Step 1 of 4: Summary

i

Attachments (0)

\*Business Unit

US001

US001 NEW YORK OPERATIONS

Entered Datetime

12/12/18 10:45PM

\*Invoice Number

\*Invoice Date

12/12/2018

\*Cost Sub-Total

Other Cost

Total Amount

0.00

\*Currency

USD

Description

Notes/Comments

Request ID

Make complex transactions simple with guided user entry with validation

# Forms and Approvals

[My Forms](#)

Tuition Reimbursement

[Review](#)
[Cancel Approval](#)

\*Description

Continuing Education - Project Management

Approval Status

Pending Approval

Created On

02/21/2020

Course Information

Course Title

PMP Level 1

School

State University

Term

Fall

Course Credit

Yes

Start Date

09/01/2020

Cost Information

Department

13000

Tuition Amount

895.00

More Information

Level 1 class. In anticipation of PMP certification in 2021.

Attachments

There is no attachment uploaded.

[Add Attachment](#)

Custom built forms within PeopleSoft that leverage field validation and approval workflow



# Drop Zones

Add your fields to existing pages in pre-configured “drop zones”

Create Requisition

Checkout

▼ Requisition Summary

Business Unit WCGEN

Requisition Name

Priority

Requester BMURKAM

Currency USD

Header Comments/Attachments

Has the Physician suggested a preferred supplier? ☐

Has a non-approved Manufacturer been requested? ☐

Surgery Date

Supplier Contact

Surgeon Name

Surgeon Unit/Room

Patient Name


▼ Requisition Lines

☐ Add to Favorites

☐ Add to Template(s)

☐ Delete Selected






☐ Mass Change

Line	Item Description	Quantity	Unit of Measure	Price	Total
1	 Hospital robes	1.0000	Box	52.95 USD	52.95 USD

# Drop Zones

< Configure Drop Zones

Configure Drop Zones



Component

Component

EX\_EXP\_SHEET\_FL

Description





Expense Report Entry

Type

Fluid

Drop Zones by Page

9 rows

Page Name	Tab Order	Drop Zone	Subpage Name
EX_SHEET_HDR_FL	2	DZ-Top of ER Header	<div>CUSTOM_SUBPAGE</div>
EX_SHEET_HDR_FL	13	DZ-Bottom of ER Header	<div><input type="text"/></div>
EX_SHEET_LN_FL	2	DZ-Top of ER Line	<div><input type="text"/></div>
EX_SHEET_LN_FL	10	DZ-Bottom of ER Line	<div><input type="text"/></div>

# Customization Use Cases

Custom Logic

OLD:

- Customization to Application Engine
- Customization to SQR



NEW:

- Event Mapping
- Pluggable App Engine

# Pluggable App Engine Actions

- Pre-defined hooks embedded in delivered Application Engine programs that allow space for custom logic.
- “Drop Zones for App Engine”
- PeopleTools – Application Engine – AE Action Plugin
- Example: Any time a delivered App Engine needs to be customized.

# Pluggable App Engine Actions

AE Action Plugin

Program Name

AMPS1000

	Enabled	*Section	*Step	*Action	*Plugin Name	*Section	*Step	*Action	*Mode
1	<input checked="" type="checkbox"/>	100000	Step10	SQL	FC_REMINDER	00000000	Step01	SQL	After

Save

Return to Search

Previous in List

Next in List

Notify

# Customization Use Cases

Custom Portal, Menus and Workflow

OLD:

- Bring back the Breadcrumbs!
- Favorites
- Home Grown Portal or Integration Hub



NEW:






- WorkCenters
- Nav Collections
- Unified Navigation

HEUG Australia & New Zealand

# WorkCenters

< Credit to Cash Operations

Billing WorkCenter



Scope

My Scope

My Work

Current Work

Invoices Not Finalized28

Consolidated Invoices Not F...3

Invoices Pending My Approval

Invoices Not Submitted for A...

Invoices Pending Approval

Installment Invoices Not Ge...2

Recurring Invoices Not Gen...2

Recurring Schedules Expiring

Invoices Entered Today

Invoices Not Finalized

Actions

GeneralDetails

<input type="checkbox"/> Business Unit	Invoice	Bill To	Customer Name	Invoice Amount	Currency	
<input type="checkbox"/> US001	TMP-00000025	1000	Alliance Group	16,500.00	USD	TMR >
<input type="checkbox"/> US001	TMP-00000013	1005	Golden Inc.	75,000,000.00	USD	TMR >
<input type="checkbox"/> US001	TMP-00000012	1005	Golden Inc.	1,100.00	USD	TMR >
<input type="checkbox"/> US001	TMP-00000011	1005	Golden Inc.	1,100.00	USD	TMR >
<input type="checkbox"/> US001	TMP-00000005	1001	Apex Systems	52,747,154.02	USD	TMR >
<input type="checkbox"/> US001	RE-00006633	1010	Florence Garden	1,515.00	USD	FNL >
<input type="checkbox"/> US001	RE-00006632	1010	Florence Garden	2,235.00	USD	FNL >
<input type="checkbox"/> US001	RE-00006621	1010	Florence Garden	50,295.71	USD	FNL >

WorkCenters  
Focus Work on  
Business  
Processes

Only take action  
when needed



# WorkCenters

**Billing WorkCenter**

**Invoices** 28 rows

Actions

- \* Finalize and Print
- \* Single Action Job
- \* Change Bill Status
- \* Email Notification
- View Proforma / Image
- Copy Bill
- Bill Summary
- Invoice Maintenance
- Supporting Documentation

Bill To	Customer Name	Invoice Amount	Currency	Bill Status	More
US001	Alliance Group	16,500.00 USD	TMR	>	
US001	Golden Inc.	75,000,000.00 USD	TMR	>	
US001	Golden Inc.	1,100.00 USD	TMR	>	
US001	Golden Inc.	1,100.00 USD	TMR	>	
US001	Apex Systems	52,747,154.02 USD	TMR	>	
<input checked="" type="checkbox"/> US001	RE-00006633 1010 Florence Garden	1,515.00 USD	FNL	>	
<input checked="" type="checkbox"/> US001	RE-00006632 1010 Florence Garden	2,235.00 USD	FNL	>	
<input checked="" type="checkbox"/> US001	RE-00006621 1010 Florence Garden	50,295.71 USD	FNL	>	
<input checked="" type="checkbox"/> US001	RE-00006620 1010 Florence Garden	77,144.02 USD	FNL	>	
<input type="checkbox"/> US001	OE-00091098 1002 Easy Solutions	15,200.00 USD	FNL	>	

# Navigation Collections

Workforce Administrator

HR Administration

Home

Search

Notifications

Menu

Help

New Window | Help

Job Information

Job Data

Workforce Job Summary

Person Profiles

Headcount

Headcount Movement

Current Headcount

Workforce Turnover

Labor Administration

HR Configuration

Dotted Line

Export Org Chart

OnBoarding

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Keyword Search

Search Criteria

Empl ID

begins with

Empl Record

=

Name

begins with

Last Name

begins with

Second Last Name

begins with

Alternate Character Name

begins with

Middle Name

begins with

☐ Include History

☐ Correct History

☐ Case Sensitive


Search

Clear

Basic Search

Save Search Criteria

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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

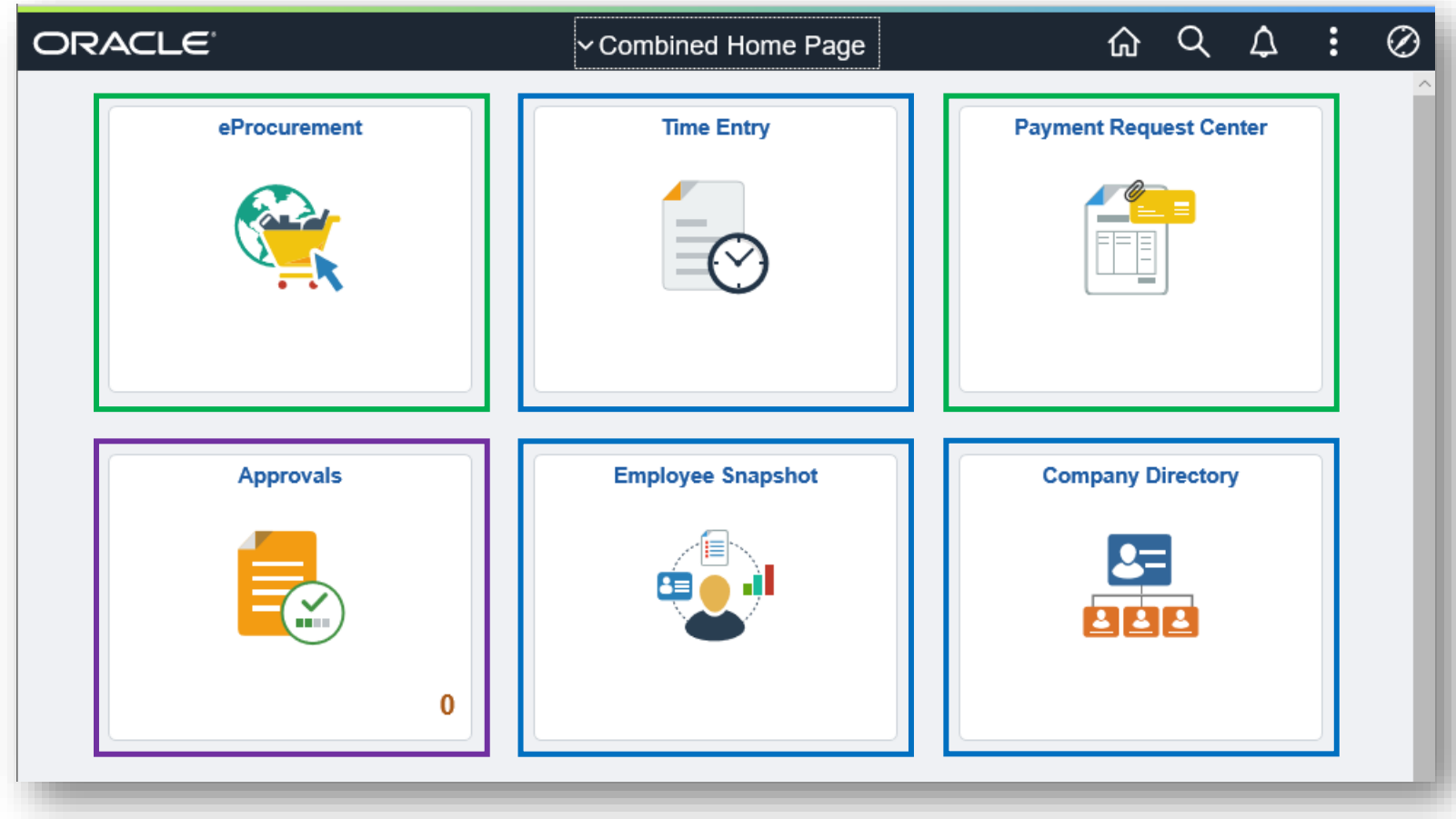
Recognized Vendor



44

# Unified Navigation

- Unified navigation provides a framework to federate multiple PeopleSoft applications as a cluster under a designated, central portal system.



# Customization Use Cases

Movement of Data in or out of PeopleSoft

OLD:

- Customization to SQR
- Customization to Application Engine
- Customer specific SQR's



NEW:

- Integration Broker
- Inbound: Excel to CI, Transaction Uploads
- Outbound: SQR, Web Services
- Application Data Sets

# Component Interfaces



API built to access, modify and upload data into PeopleSoft.



Most PeopleSoft Components have delivered Component Interfaces.



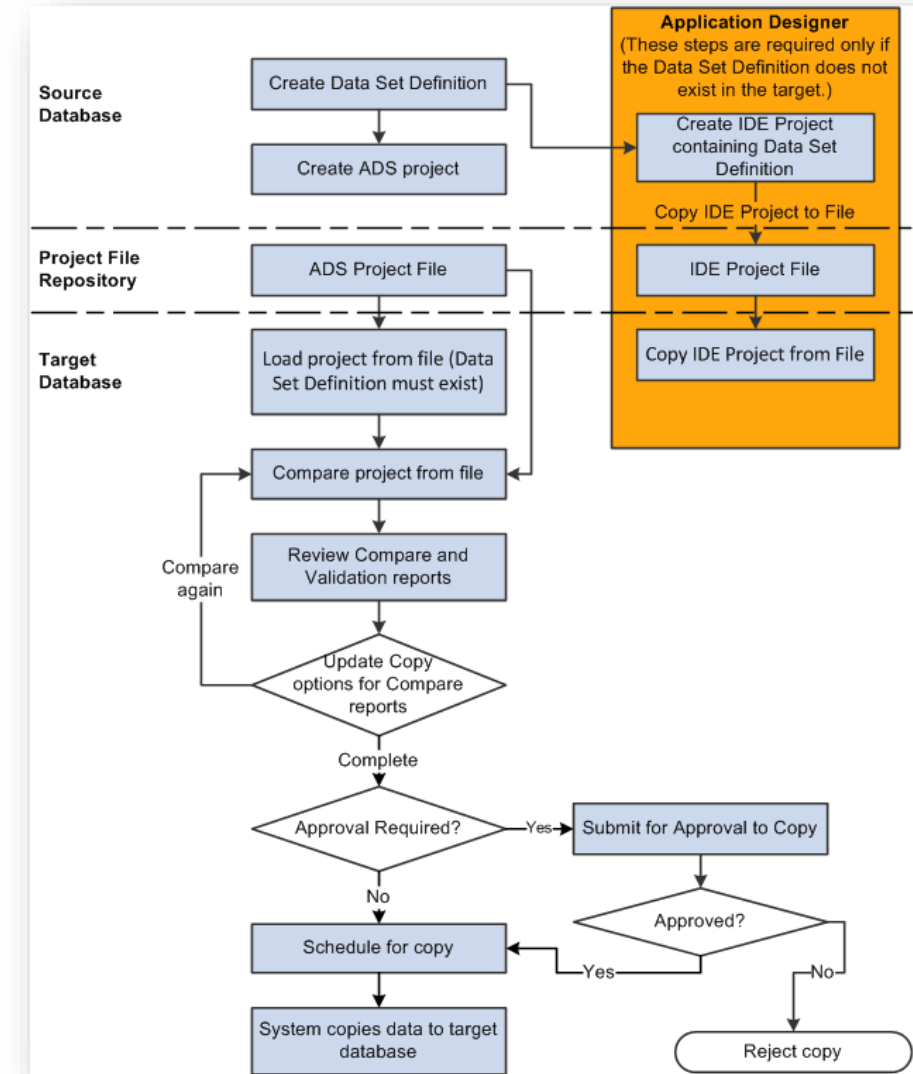
Leverages existing PeopleSoft components with all the validation and record hierarchy built in.



An Excel to Component Interface tool is delivered as a free form utility that can be hooked up to any C.I.

# Application Data Sets

- Lifecycle Management Tool for Configuration and other Data
- Pros: Repeatable process, Confidence in Migrations to Prod
- Cons: Upfront Setup time, Testing



# Customization Use Cases

## Custom Lookups/References

### OLD:

- Page Customization, Add links
- Query
- Offline Reports



### NEW:

- Related Content Framework



# Related Content Framework

Enables ability to link application pages with contextually relevant collaborative content, which creates opportunities for the user to view or quickly access information that supports, extends, and augments any PeopleSoft transaction.

Oracle delivers related content to many pages (and continues to add more)

Two Flavors: Related Content and Related Actions

# Related Content Framework

Basic Add

Related Content | New Window | Help | Personalize Page

General Information

Operation/Maintenance

Asset Acquisition Detail

Location/Comments/Attributes

Manufacture/License/Custodian

Unit US001

Asset ID 000000000001

SOLARIS WORKSTATION

Tag

In Service

Asset Information

DescriptionSOLARIS WORKSTATION

Short DescSOLARIS WO

CAP #

Seq #

☒ Taggable Asset

Tag Number

Asset Class

Auction Status Allowed to be Auctioned

Related Content

Cost History

Unit US001

Asset ID 000000000001

SOLARIS WORKSTATION

Asset Cost History

Book

Book Name CORP

Corporate

Currency USD

Total Cost 7,500.00

\*Acquisition Code Purchased

FERC Code

Financing Code

# Related Actions

- Designed to not only view but take action.
- Secondary tab, secondary browser window or a modal (hovering) window to take an action prior to returning to original action.

# Related Actions

Manager Self Service

Team Time

Home

Search

2

More

Refresh

Enter Time

Branda Abad

Data Entry Operator

Return to Select Employee

Previous

Next

View Legend

20

Monday

Apr

Reported 0.00 /Scheduled

21

Tuesday

Actions

Attendance Violation

View Exceptions

Time Summary

Cancel Absences

Payable Time

Attendance Violations

April - 26 April 2020

Weekly Period - PS Delivered

Reported 0.00 | Unapproved Time 0.00

Show All Punch Columns

Clear

Save for Later

Submit

In	Out	Time Reporting Code	Quantity	Time Details	Comments

# Customization Use Cases

## Analysis/Reporting

### OLD:

- Query
- Reports
- Home grown analytics



### NEW:

- Pivot Grids
- Open Search/Dashboards

# Pivot Grids

← Cameron's Homepage

Top 20 Employees Spenders

Home

Search

Notifications

More

Help

▼ Prompts

Business Unit

US001

From Date

01/01/2000

To Date

09/02/2014

Search

▼ Currency

☐ USD (26)

▼ Business Purpose

☐ General Travel and

☐ Demonstrations (8)

☐ Off-site Meeting (5)

☐ Technical Training (3)

☐ Consulting Services (1)

▼ Name

Top 20 Employees Spenders

0

2K

4K

Bar

Line

Pie

Pivot

Empl ID	Actions	Name	Business Unit	Department	Report ID	Report
KU0042	⌵		US001	41000-Engineering	0000000049	Paid
KU0042	⌵		US001	41000-Engineering	0000000051	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000052	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000055	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000064	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000052	Paid
KU0042	⌵	Kenneth Schumacher	US001	41000-Engineering	0000000055	Paid

Actions

Review Expense Report

Business Purpose

Technical Training

Off-site Meeting

Demonstrations

Off-site Meeting

# OpenSearch/Dashboards

Dashboard / Workforce Composition

Full screen

Filter

Emplo

Full-T

Age Range

Emplo

Employee

Workforce Insight

Payables Operations

Open in Kibana

Filters

Search

+ Add filter

Voucher Source across Date/Time Entered

# Vouchers

# Vouchers by Currency and Voucher Source

Voucher Detail

Date/Time Entered	Business Unit
Mar 6, 2020 @ 03:53	US002
Mar 6, 2020 @ 02:53	US002
Mar 6, 2020 @ 01:53	US001

Finance & Accounting

Kibana Visualizer

Open in Kibana

Filters

Search

KQL

Last 15 minutes

Show dates

Refresh

Exclude Closing Journals

Department Tree Name: No Tree Selected

Base Currency: USD

Ledger: LOCAL

Account Tree Name: ACCTROLLUP 1900-01-01

Fiscal Year is one of 2018, 2019, 2020

Add filter

Base Currency

USD

Ledger

LOCAL

Business Unit

Select...

Fiscal Year

2018

2019

2020

Accounting Period

Select...

Account Tree Name

ACCTROLLUP 1900-01-01

Level 2 Account Node

Select...

Level 3 Account Node

Select...

Level 4 Account Node

Select...

Level 5 Account Node

Select...

Department Tree Name

No Tree Selected

Level 2 Department Node

Select...

Level 3 Department Node

Select...

Apply changes

Cancel changes

Clear form

YOY Comparison

USD Base Currency Amount

2019

2018

2020

Asset

Expense

Liability

Revenue

Account Type

Top 5 Expense Accounts

2020

2019

2018

Salaries & Wages (71.6%)

Cost of Goods Sold (3.9)

Cost of Goods Sold (15.97%)

Office Supplies (2.56%)

Utilities (5.57%)

Salaries & Wages (16.48%)

Cost of Goods Sold (38)

Cost of Goods Sold

Salaries & Wages

Utilities

Miscellaneous

Office Supplies

Airfare

USD: Base Currency

Top 5 Revenue Accounts

2020

2019

2018

Service Revenue (2.28%)

Product Revenue (6.34)

Product Revenue (25.77%)

Service Revenue (5.22%)

Product Revenue (58.9)

Service Revenue

Product Revenue

Other Revenue

Division Revenue

USD: Base Currency

Ledger Details

Business Unit	Ledger	Account	Department	Base Currency	Amount
US005	LOCAL	USBNK - Treasury Account	Human Resources	USD	0
US005	LOCAL	Sales Tax	No Value	USD	49,200
US005	LOCAL	Salaries & Wages	No Value	USD	-600
US005	LOCAL	Petty Cash	No Value	USD	-50,000
US005	LOCAL	Petty Cash	Human Resources	USD	-20,000

Supplier Name

Voucher Source

Intermediaires Associes

Online

Bike Shopper

Online

Tanden Computers

Online



# Questions





# Thank You

**CAMERON MCCLURG**

Vice President

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LinkedIn: [cameron-mcclurg](#)

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# Appendix

# FFNWB

## Objectives:

- Utilize Extra Fields for Data Entry

# FENWB

< My Homepage

Page and Field Configurator

Page Configuration

User List

Map to Portal Registry

Component NameVNRD\_ID

\*DescriptionUBI

Criteria ?

Sequence Number1

Criteria

No Criteria Defined.

Define Criteria

Copy Criteria

User List

Configure Field Properties ?

SelectField NameLabel

1VNRD\_FIELD\_C30\_AUBI

Copy Field Properties From

< Records

Supplier

Summary

Identifying Information

Address

Contacts

Location

Custom

SetIDSHARE

Supplier ID0000000089

Short Supplier Name3R TECHNOL-001

Supplier3R Technology LLC

UBI

Supplier Field C30 F

Supplier Field C30 G

Supplier Field C30 H

Supplier Field C30 I

Supplier Field C30 J

Save

Return to Search

Notify

Add

Update/Display

Include History

Correct History

Summary

Identifying Information

Address

Contacts

Location

Custom

# Vulcan

## Objectives:

- Streamline pages
- Help Users with Key information
- Protect Sensitive Data
- Avoid bugs

# Vulcan

General

Page and Field Configurator

Page Configuration

User List

Map to Portal Registry

Component Name

VNDR\_ID

\*Description

Supplier Changes

Validate Configuration

Review Sequence Processing

Criteria

Sequence Number

1

Description

All Employee

Criteria

No Criteria Defined.

Define Criteria

Copy Criteria From

Apply

User List

Select Fields

Configure Field Properties

Field Name	Label Text
1 ATTACHADD	Add Attachment
2 ATTACHMENTS_PB	Attachments
3 IBAN_PAPER	IBAN Paper
4 STD_ID_NUM	ID Number
5 GFAP_EFT_BBK_NAME	Beneficiary Bank Name
6 GFAP_EFT_BBK_REM	Beneficiary Bank Remarks
7 BANK_ACCOUNT_NUM	Bank Account #

My Preferences

Supplier

Summary

Identifying Information

Address

Contacts

Location

Custom

SetID

MODEL

Supplier ID

0000027557

\*Supplier Short Name

VERIZON

VERIZON-002

\*Classification

Outside Party

HCM Class

Regular

\*Persistence

Regular

Supplier Status

Approved

\*Supplier Name

Verizon

Additional Name

Withholding

Open For Ordering

VAT Registration

\*Supplier Audit

Default

Supplier Audit

Approval History

Expand All

Collapse All

Supplier Relationships

Corporate Supplier

Corporate SetID

MODEL

Corporate Supplier ID

0000027557

Verizon

InterUnit Supplier

InterUnit Supplier ID

Supplier Hierarchy

Supplier 360

Create Bill To Customer

# Vulcan

Page Configuration

User List

Map to Portal Registry

Component Name

VNDR\_ID

Market

Global

Level

Sequence Level

Configuration Type

Standard

Criteria

1 of 2

View All

Sequence Number

1

Description

All Employee

AppliesTo

All With Excluded Roles/Users

Excluded Roles

1-2 of 2

View 1

	Role Name	Description		
1	AP Vendor Add	Vulcan AP Vendor Add	+	-
2	AP Vendor Approval	Vulcan AP Vendor Approval	+	-

Excluded Users

1-1 of 1

View All

	User ID	Description		
1			+	-

Save

Return to Search

Previous in List

Next in List

Add

Update/Display



# Vulcan

Page Configuration

User List

Map to Portal Registry

Component NamePV\_MOB\_855\_CMP

\*DescriptionePro changes

Validate Configuration

Review Sequence Processing

Criteria ?

Sequence Number1DescriptionSpecial Request

Criteria

No Criteria Defined.

Define CriteriaCopy Criteria From☐ Apply Additively

User List

Device Form Factor

Select Fields

Configure Field Properties ?

	Field Name	Label Text	Mo
1	PV_SUG_VNDR_PB	Suggest New Supplier	<input type="checkbox"/>
2	VNDR_LOC	<input type="text" value="Supplier Location"/>	<input checked="" type="checkbox"/>
3	PV_VIEW_APPROVALS	Preview Approvals	<input type="checkbox"/>

Copy Field Properties From

Browse Catalogs

Item History

Favorites

Templates

Special Requests

Fixed Cost Service

Variable Cost Service

Time and Materials

Special Requests

\*Item Description

\*Price

\*Quantity

\*Category

Supplier ID

Supplier Location

Supplier Item ID

Manufacturer ID

Manufacturer's Item ID

Additional Information

Send to Supplier

☐ No

Shown at Receipt

☐ No

Shown at Voucher

☐ No

Add

# Vulcan

General

Page and Field Configurator

Page Configuration

User List

Map to Portal Registry

Component NamePR\_WIZARD\_FLMarketGlobal

\*DescriptionVulcan Pmt RqstConfigurations\*StatusActive

Validate Configuration

Review Sequence Processing

Criteria

Sequence Number1Description

Criteria

No Criteria Defined.

Define CriteriaCopy Criteria FromApply Additively

User List

Device Form Factor

Select Fields

Configure Field Properties

	Field Name	Label Text	Modify Label	Hide Field	Disable Entry
1	INVOICE_ID	Invoice Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	ADD_VNDR_PB	Request New Supplier	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Copy Field Properties From

Step 1 of 4: Summary

Attachments (0)

\*Business Unit40010Vulcan Inc

\*Invoice Number

\*Invoice Date05/13/2021

\*Cost Sub-Total

Other Cost

Total Amount0.00

1Summary2Supplier

Step 2 of 4: Supplier

CountryUSA

Supplier Name

Supplier ID

Search

# Vulcan

✕ Exit

Payment Request

1

Summary

2

Supplier

3

Invoice Details

4

Receipt

Step 2 of 4: Supplier

Enter New Supplier

Supplier Search

Supplier Address

Supplier ID

0000000015

Supplier

AT&T


Payment Center

Sacramento, CA 95887-0001

Payment Address

Payment Center

Sacramento, CA 95887-0001



Payment Information

Payment Method

ACH

# King County

## Objectives:

- Reduce tickets related to difficult setup pages.

Employee Self Service

Page and Field Configurator

Page Configuration

User List

Map to Portal Registry

Component Name

TL\_DYNAM\_GRP

Market

Global

\*Description

Agency Dyn group setup

\*Status

Active

Validate Configuration

Review Sequence Processing

Criteria

Sequence Number

1

Description

Status

Active

Criteria

No Criteria Defined.

Define Criteria

Copy Criteria From

Apply Additively

User List

Select Fields

Configure Field Properties

Field Name

Label Text

Modify Label

Hide Field

Disable Entry

Required Field

Default Value

1	KC_GROUP_CATEGORY	Group Category	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A	-
2	FIELDNAME	Field Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TIME_RPTG_STATUS	-
3	GROUP_OPERATOR	Operator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	=	-
4	GROUP_VALUE	Field Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A	-
5	RECNAME	Record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TL_EMPL_DATA	-

# King County

## Results:

- 63% reduction in tickets related to Time and Labor Dynamic Group entry

< General

Dynamic Group

Selection Criteria

Potential Group Members

Security by Group

Current Group Members

Group ID 01BDG

Dynamic Group Details

\*Description

Batch DAJD

Short Description

DAJD

Taskgroup for Time Reporting

\*Group Category

Batch

Last Refresh Date/Time

01/21/2021 7:00PM

☐

TL Approval Group

Select Parameters

1-2 of 2

View All

*Operand	*{	*Record	*Field Name	Set ID	*Operator	Field Value	*)		
	(	TL_EMPL_DATA	WORKGROUP		=	DAJDE		+	-
OR		TL_EMPL_DATA	WORKGROUP		=	DAJDN	)	+	-

Where Clause

Where Clause

FROM %SQL(TL\_GRP\_FROM\_BASE)%SQL(TL\_GRP\_FROM\_TL) WHERE  
%SQL(TL\_GRP\_BATCH\_WHERE\_BASE,%P(1))AND %SQL(TL\_GRP\_BATCH\_WHERE\_TL,%P(1))  
AND ((TL\_EMPL\_DATA.WORKGROUP = 'DAJDE' OR TL\_EMPL\_DATA.WORKGROUP = 'DAJDN'))

Create SQL

View SQL

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Selection Criteria | Potential Group Members | Security by Group | Current Group Members

# 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



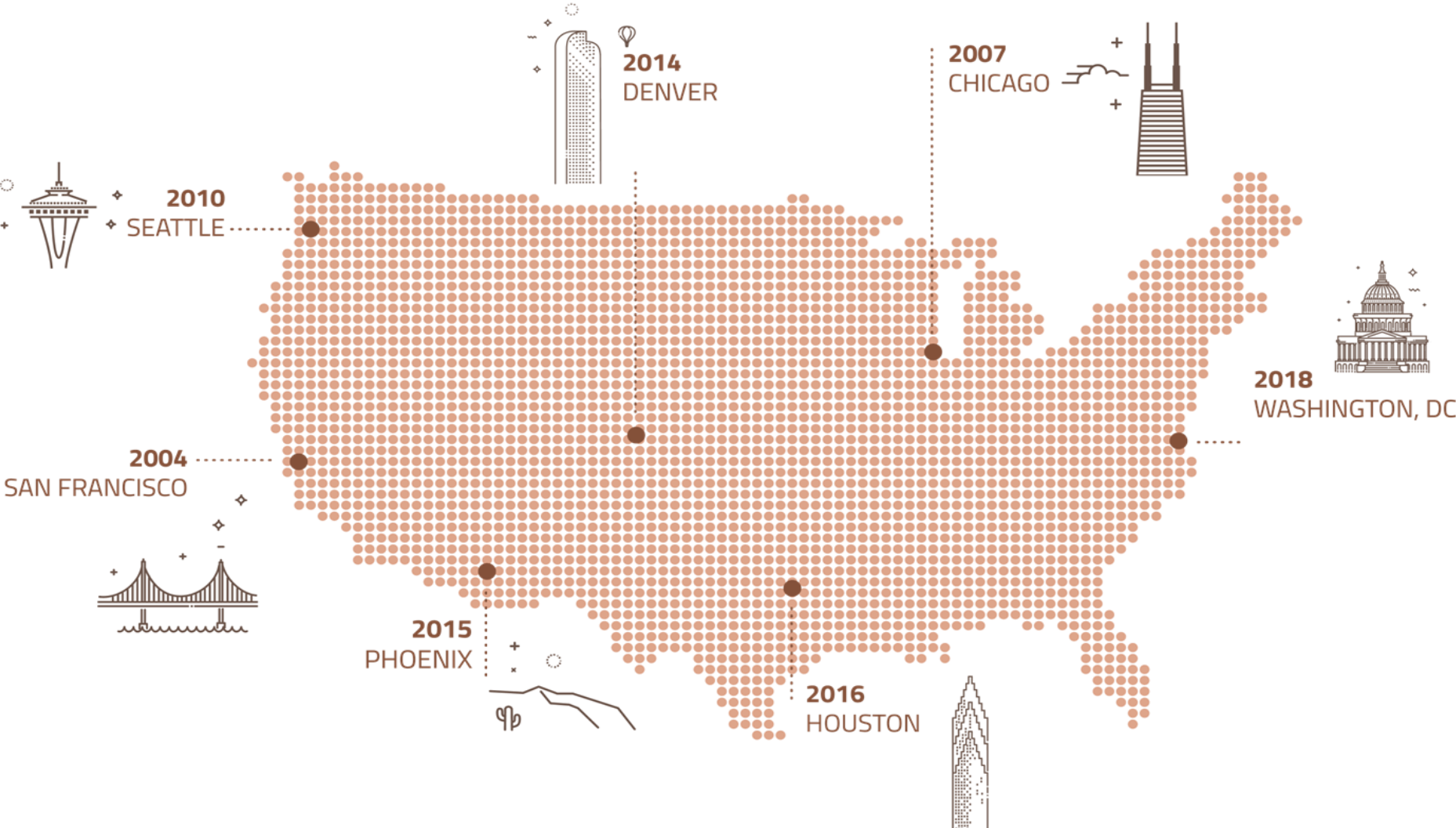
# 2024 Training Calendar

## 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.

