



Oracle Guided Learning

For PeopleSoft



CAMERON MCCLURG

Vice President

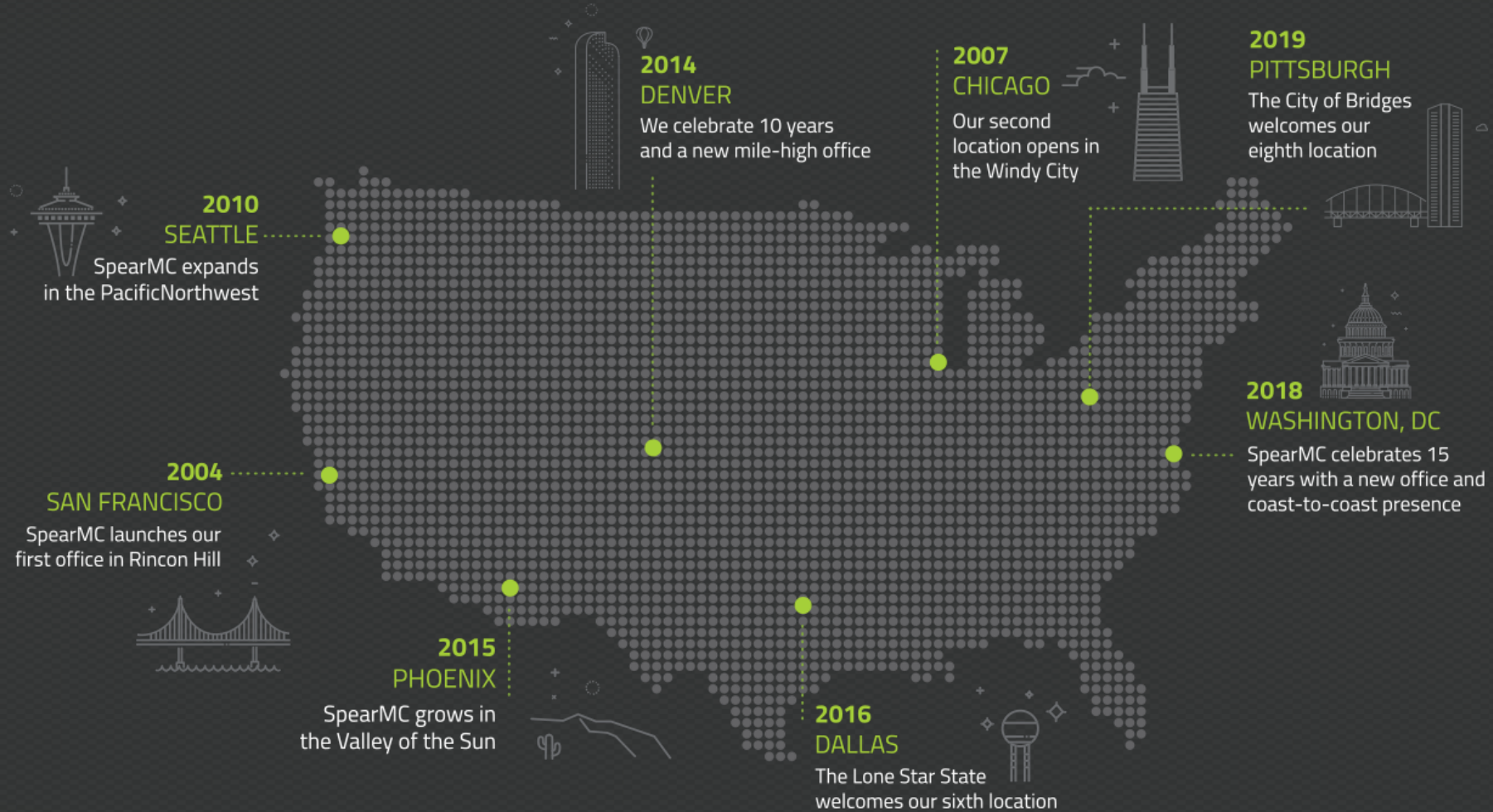
cameron@spearmc.com

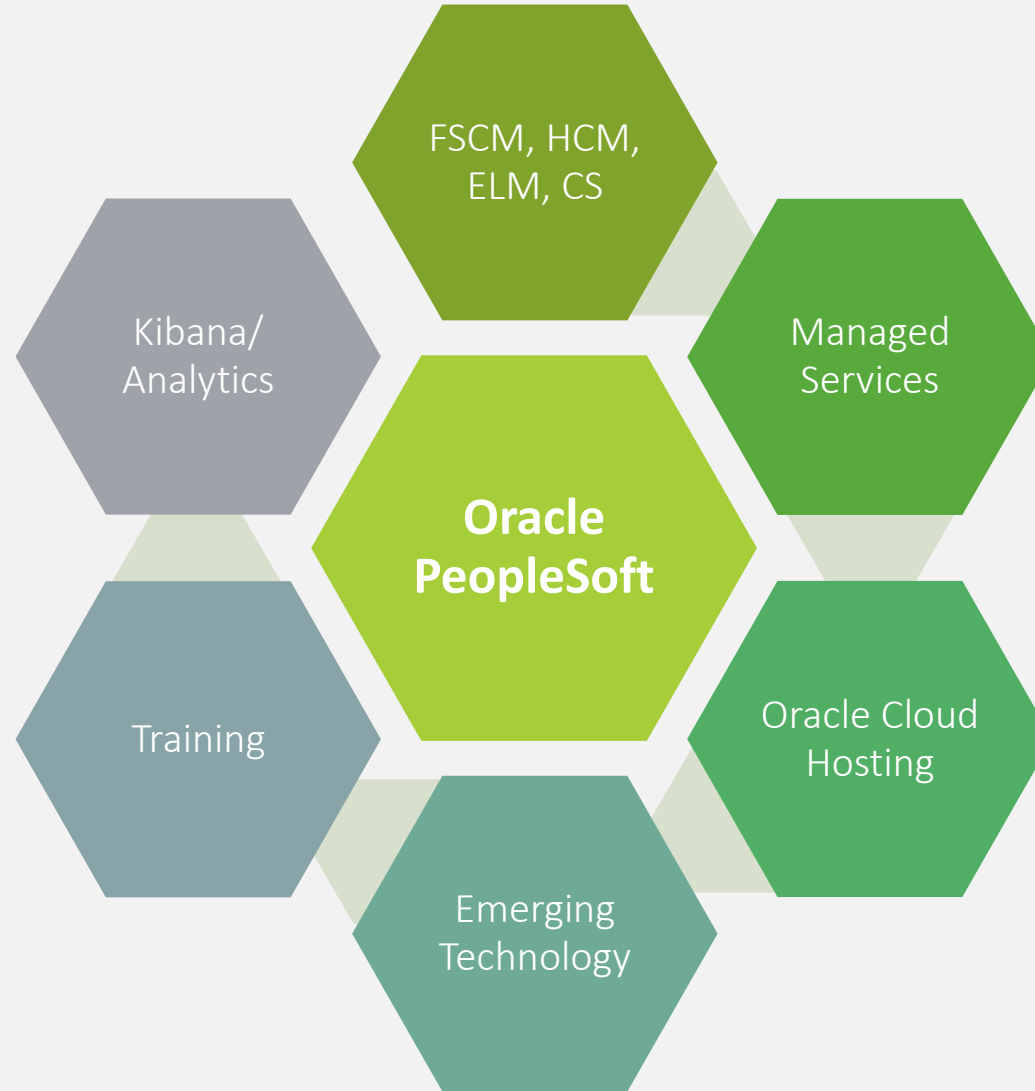
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Certifications: PeopleSoft, Oracle Guided Learning, Oracle Cloud Infrastructure, Hyperion Planning







SpearMC is the sole featured PeopleSoft vendor in the latest 2021 & 2022 Gartner Market Guide for Oracle Professional Services. We invested heavily into PeopleSoft several years ago and went “all in” with our leading approach to Oracle Cloud Infrastructure.



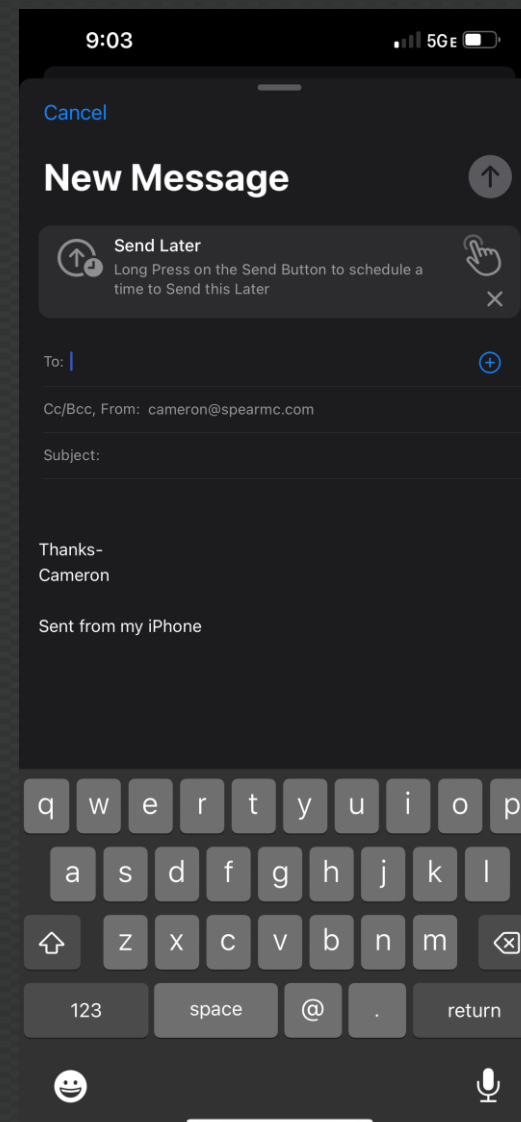
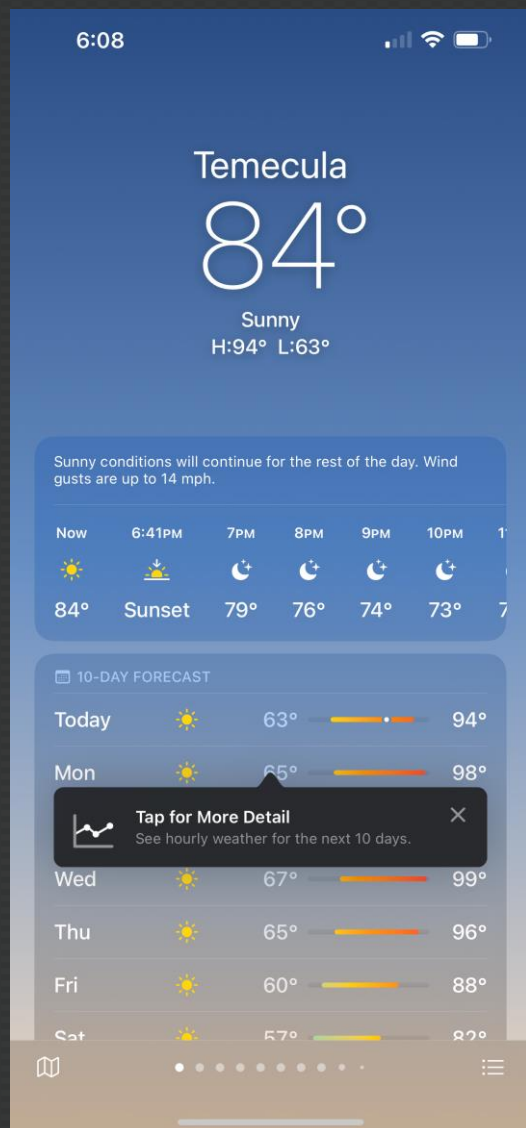
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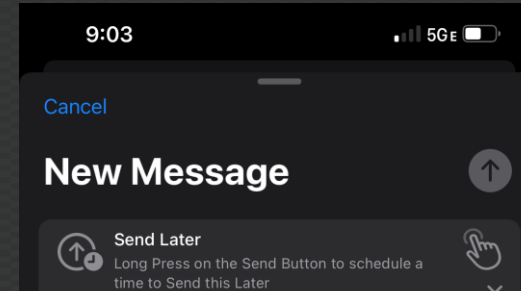
The State of UPK

Digital Adoption Platforms

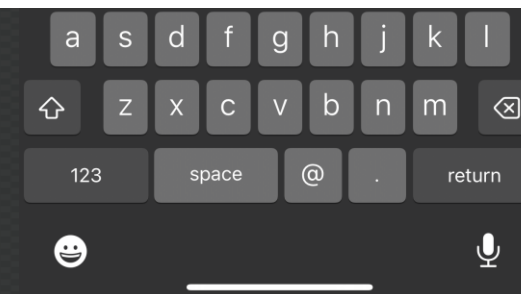
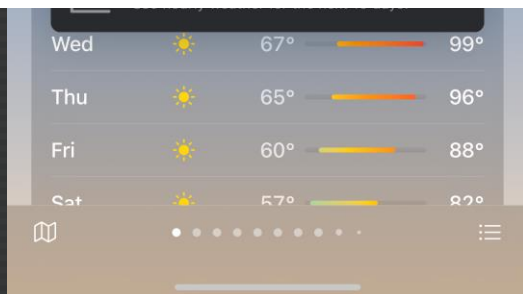
What is a Digital Adoption Platform



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

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

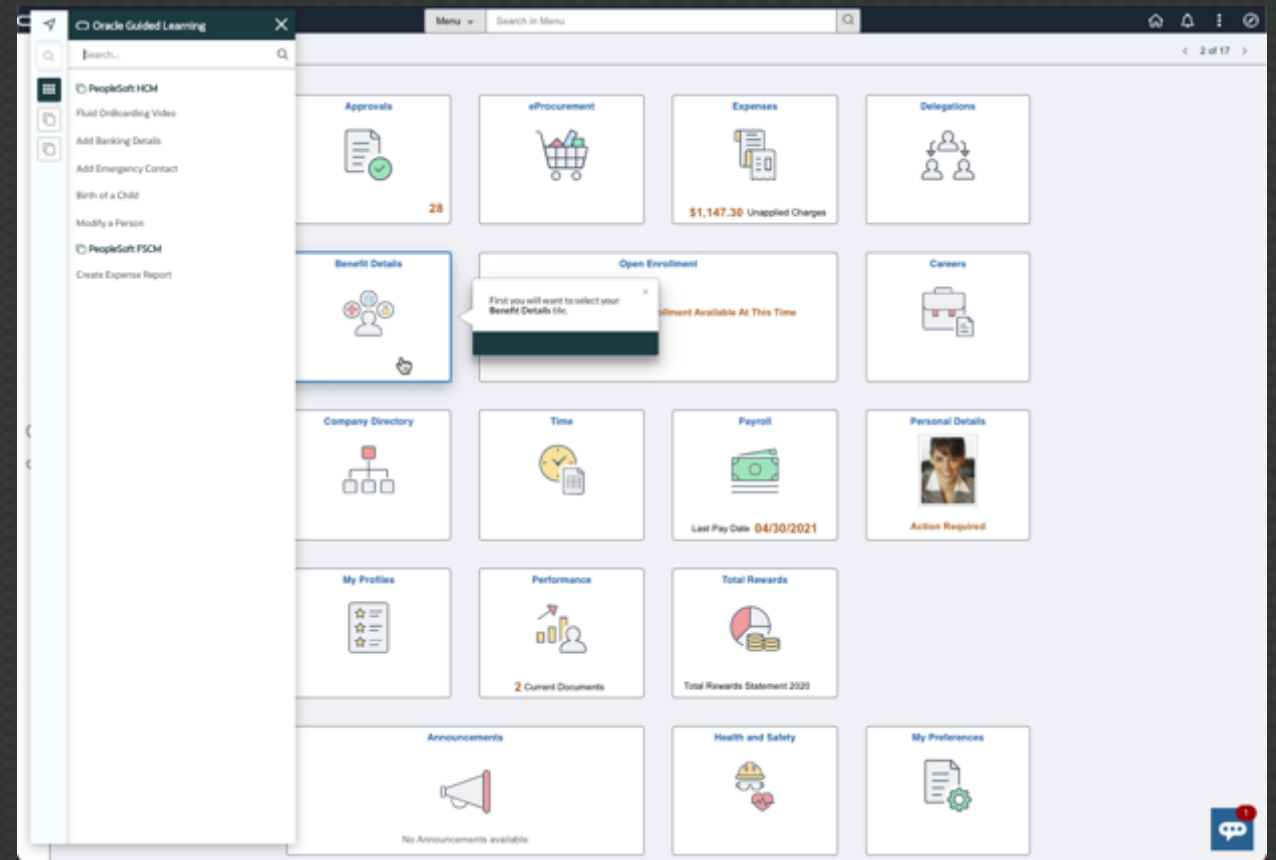
3 Analytics

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

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



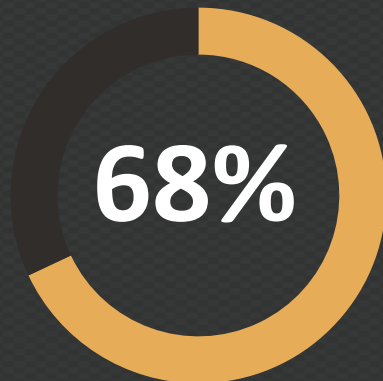
Users enabled through just-in-time, context-sensitive learning that is personalized for each role and your organization



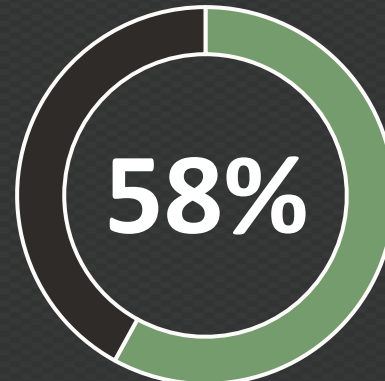
Manage Change Communications around upgrades, process, and policy changes



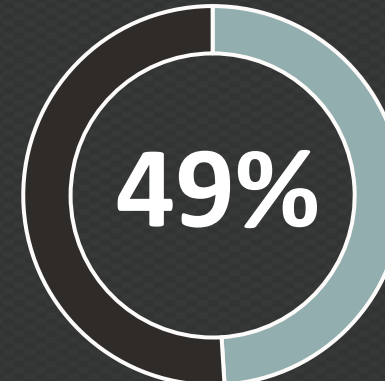
Fewer support calls and lower costs - analytics to consistently optimize usage/adoption



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

2018 LinkedIn Workplace Learning Report

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

The screenshot displays the Oracle Guided Learning (OGL) interface. The top navigation bar includes the OGL logo, the current environment 'OGL Partner - Spear...', the application 'Peoplesoft HCM', a 'PRODUCTION' status indicator, and the user 'cameron@spearmc.com'. The main interface is divided into a left-hand 'CONTENT' editor and a right-hand dashboard.

The 'CONTENT' editor shows a 'Transfer Employee' guide in progress. It includes a 'CONTENT ITEMS' sidebar with categories like Process, Message, Video, Link, Task List, Beacon, Smart Tip, Training, Launcher, Hotspot, Archive, Products, Modules, Display Gro, Health, Roles, Pages, Training Ty, and Theme. The main editor area shows a step titled '1 Enter Tran...' with a rich text editor and a search bar containing the text 'Enter Transfer empf in the Keyword Search bar.' A 'Save & Close' button is visible at the top of the editor.

The dashboard on the right features a grid of analytics tiles:

- Travel and Expense Activity:** A bar chart titled 'Top Expense Policy Violators' showing the number of violations for employees like Patterson, John, Donahue, and Stevenson. A legend indicates 'Count of Violati'.
- My Budget:** A circular gauge showing '30% Budget Spend'.
- Employee Snapshot:** A tile with a document icon and a green checkmark, showing a count of '28'.
- Company Directory:** A tile with a hierarchical organizational chart icon.
- My Team:** A tile with an icon representing a group of people.
- Employee Snapshot:** A tile with an icon of a person and a magnifying glass.
- Team Time:** A tile with a clock icon and a group of people, showing '26 Exceptions'.
- Absence Analytics:** A tile with an icon of a briefcase and a pie chart.
- Team Performance:** A tile with a bar chart icon and a group of people, showing '8 In Progress Documents'.

A tooltip is visible over the 'Employee Snapshot' tile, stating: 'Enter Transfer empf in the Keyword Search bar.'

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 displays a 'GUIDE RUNS' line chart and a 'GUIDE DATA ANALYSIS' table. A 'Report for Kaiser Development A' overlay is open, showing configuration options for a report. The 'Report Type' is set to 'User', and the 'Date Range' is from 2021-03-01 to 2021-03-31. The 'Application(s)' are set to 'Select Application(s)', and the 'User(s)' are set to 'All'. The 'Guide Type' is set to 'All', and the 'Guide Status' is set to 'All'. The report preview shows a table with 58 rows of data.

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 interface for the 'Add Banking Details' process. It is divided into two main sections: 'STEP VIDEO' and 'STEP 1'. The 'STEP VIDEO' section shows a video player with a play button and a progress bar. The 'STEP 1' section shows a screenshot of the Oracle Manager Self Service interface with a red box highlighting the 'Expand the drop down' instruction. Below the screenshot, there is a 'Print' panel with options for destination (HP OfficeJet 4650 ser), pages (All), copies (1), layout (Portrait), and color (Color). A 'More settings' dropdown is also visible.

Below the main interface, there is a 'Step Guide - Message (HTML)' window. The window title is 'Step Guide - Message (HTML)'. The menu bar includes File, Message, Insert, Options, Format Text, Review, and Help. The 'Options' menu is open, showing options like Themes, Colors, Fonts, Effects, Page Color, Bcc, Show Fields, Use Voting Buttons, Request a Delivery Receipt, Request a Read Receipt, Save Sent Item To, Delay Delivery, and Direct Replies To. The 'Send' button is visible, and the 'From' field is set to 'cameron@spearmc.com'. The subject is 'Step Guide'. Below the message content, there is a link to the step guide: https://guidedlearning.oracle.com/player/latest/api/scenario/export/FpyqTNgfRGqzQis9zzLkMQ/m34z4dkt/lang/--/?draft=dev&_id=1654097265400

DEMO

Does OGL work for PeopleSoft on Prem? Yes

Does OGL work for PeopleSoft in Classic Mode? 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?

“Net New” Licensing

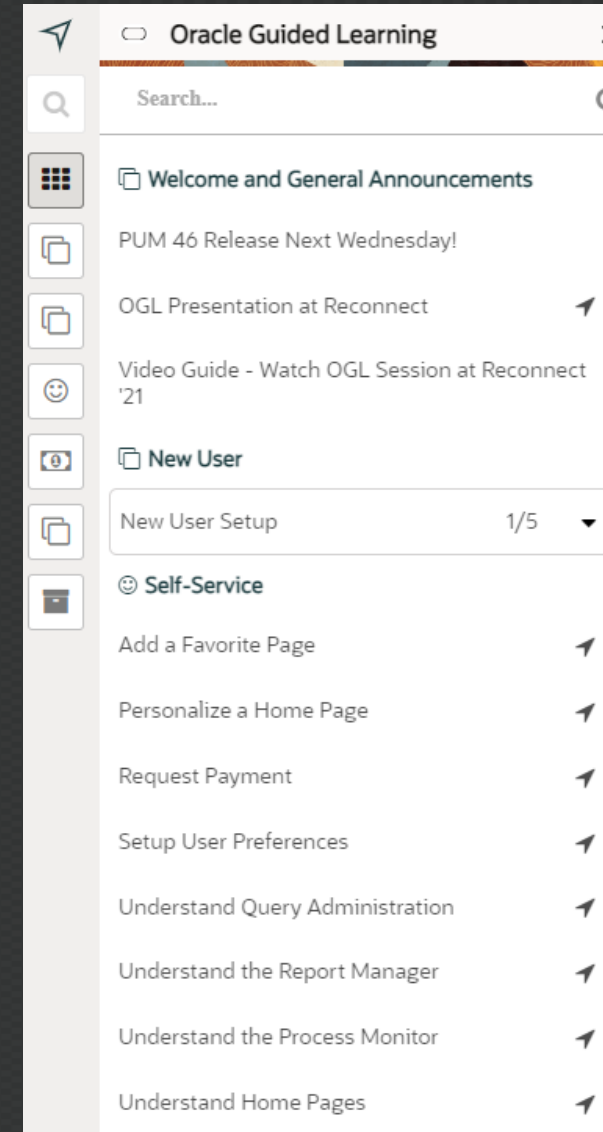
SpearMC Consulting is the official Reseller of OGL for PeopleSoft

- 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 Bundles Installation, 2 Guide Build and Training Workshop

Note: Additional Implementation and Starter Kit Sold Separately

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)



SpearMC's Pathway to OGL

Planning:

- Training/Play
- Proof of Concept
- Perform impact analysis on the modules and transactions with greatest benefit to end users.
- Review existing material available in-house and from SpearMC's PeopleSoft Starter Kit and Training Library.

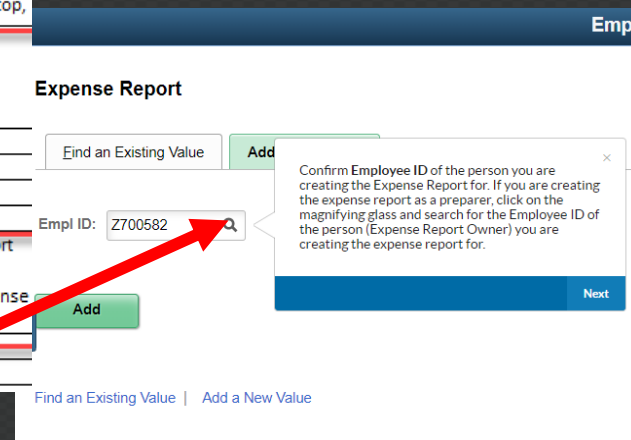
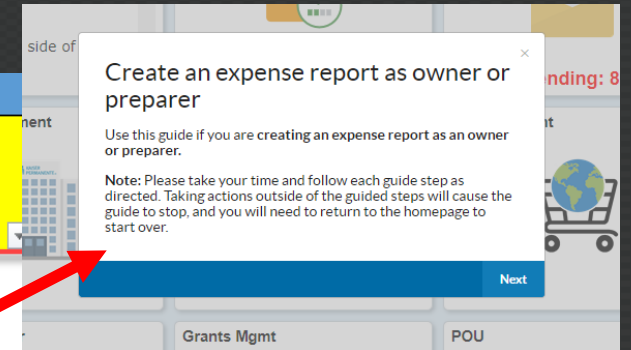
Developing:

- Perform a Needs Assessment.
- Ideally start with steps from existing UPK content or other job-aids.
- Create Initial Guides/Assess

Roll-out and Maintenance:

- Leverage internal Change Management Expertise, Pilot group
- Start small and Expand
- SpearMC's Managed Learning Services will keep your OGL content up-to-date with each PUM.

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 Employee ID 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!

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