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PeopleSoft
RECONNECT

SESSION ID: 103230

CLOUD, SAAS, PEOPLESOFT, AND
YOU: PREPARING FOR WHAT'S NEXT

MAY 9, 2023

PeopleSoft
RECONNECT LIVE!
AT BLUEPRINT4D

Gideon Taylor 2023 Presentation Schedule

Session Name	Session #	Day & Time	Presenter	Co-Presenter	Description
Great Ways for Users to Navigate Today's PeopleSoft	103250	May 8, 4:30PM	Holger Noreke		Learn how to quickly leverage delivered functionality to make PeopleSoft efficient, modern and more engaging for users. PeopleSoft has delivered so many shiny new features, are you taking advantage of them to improve your users' experience?
Cloud, SaaS, PeopleSoft, and You: Preparing for What's Next	103230	May 9, 10:15AM	Paul Taylor		In today's market, organizations have options on whether/how/when to move to the Cloud. Some are reimplementing to new SaaS solutions; others are optimizing PeopleSoft and lifting their existing ERP/HCM to the Oracle Cloud Infrastructure; and others are choosing to integrate Cloud-based solutions with their on-premise PeopleSoft applications.
PeopleSoft in the Cloud: Building a Bridge to What's Next	103240	May 9, 11:30AM	Paul Taylor	Andrew Bediz	It doesn't take an "Oracle" with a crystal ball to tell you that the Cloud is in your future. It almost certainly is.
AI Cage Fight! Gideon Taylor's Ida vs. ChatGPT! (Theater Session in Exhibit Hall)	109430	May 9, 12:35PM	Andrew Bediz	Paul Taylor	OpenAI's ChatGPT has wowed the world, disrupted industries, and inspired millions with fresh ideas of what artificial intelligence can accomplish in the real world. And hey, we admire ChatGPT as much as anyone - but as purveyors of the premier enterprise chatbot solution, Ida, brought to you by our IntraSee team, we're pleased to inform you that there's gonna have to be a smackdown!!
Move to Cloud, Make Users Happy, Save Money: In What Order?	103270	May 9, 3:30PM	Paul Taylor		When starting a digital transformation, it is best to know why you're doing it. Is moving to the Cloud a means to an end, or an end in itself? In this session we'll take a hopefully sober, and likely sobering look at outcomes you can expect when you put these three objectives in various orders.
Prologis is Totally Owning PeopleSoft Workflow (and you can too!) Building custom eForms to Transform the Supplier Self-Service Experience	103200	May 10, 11:15AM	Kyle Hupf	Paul Taylor	Have you ever wondered if there was a better way to include someone outside your organization in your PeopleSoft workflow? Whether this involves new employees filling out pre-hire onboarding forms, external vendors managing their own account data, or parents approving financial aid documents, all of these can benefit from having secure access to certain PeopleSoft pages and applications.
5 Great Ways to Supercharge PeopleSoft	103110	May 10, 4:00PM	Holger Noreke		Hang on to your hats! You're in for a quick spin around some of the greatest features PeopleSoft has to offer. If you're not using them already, you really should be! We'll take you through a tour of the following technologies and features, what they can do for you, and

Agenda

- Welcome and Introductions
  - Paul Taylor– *CEO, Gideon Taylor*
  - Andrew Bediz – *Managing Director, IntraSee Division*
- Burning Cloud Questions - Deconstructing the Cloud Journey
- Case Study: Northwell Health Implements Oracle HCM Cloud
- 3 (of 8) Top Tips for Cloud Readiness
- Shameless Plugs

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GT eForms™ - Validated PeopleSoft Automation Solution

PeopleSoft Project Services

AI Digital Assistants

Process Optimization Analysis

PeopleSoft 'Keep Current' Services

Full-Stack Cloud Managed Services

Automation Centers of Excellence

Integrated / Automated Testing – PeopleSoft and Beyond

Robotic Process Automation

Give Your Enterprise a Voice

Delivering on the Promise of Enterprise Technology

Gideon Taylor enables clients to envision and create custom solutions for eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, WebUX and conversational AI.

Founded in 2001, based in American Fork, UT

Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations.

ORACLE | Partner   **UiPath™ Partner** SILVER

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DECONSTRUCTING THE CLOUD JOURNEY:
BURNING CLOUD QUESTIONS

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BURNING CLOUD QUESTIONS

❑ When is the right time to move to the Cloud?

❑ How should we choose Cloud solutions?

❑ How should we choose Cloud providers?

❑ What benefits should we expect?

❑ How will our team's jobs and responsibilities change?

WAIT, WHAT FLAVOR OF "CLOUD" ARE WE TALKING ABOUT?

SaaS - Software as a Service
Someone else's software instance

PaaS - Platform as a Service
Build and run solutions using rented tools

IaaS - Cloud Hosted
Someone else's data center

Subscription Licensing
Rent the software

Managed Services
Someone else operates, maintains, and fixes stuff

Everybody has their own journey.
- Thalia

QUIZ #1 – WHICH SWITCH, MITCH?

- 🟢 Cloud Hosted
- 🟢 Subscription Licensing
- 🟢 Software as a Service
- 🟢 Managed Services
- ⚪ Platform as a Service

Fine Brines Corp. moves from PeopleSoft HCM and FSCM on-prem to Oracle HCM Cloud and Oracle ERP Cloud.

QUIZ #2 – WHICH SWITCH, MITCH?

Fuzz E. Fuzz Inc. implements PICASO in their on-premise PeopleSoft HCM system using internal resources.

- ⚪ Cloud Hosted
- 🟢 Subscription Licensing
- ⚪ Software as a Service
- ⚪ Managed Services
- 🟢 Platform as a Service

QUIZ #3 – WHICH SWITCH, MITCH?

🟢 Cloud Hosted

🟢 Subscription Licensing

⚪ Software as a Service

🟢 Managed Services

⚪ Platform as a Service

Ink-U-Baiter Ltd. works with a third party (like Gideon Taylor!) to move their PeopleSoft systems from their own data center to OCI and keep them current.

BURNING CLOUD (SORT OF) ANSWERS

Q: When is the right time to move to the Cloud?

A: When doing so will impose the smallest interruption to innovation.

Q: How should we choose Cloud solutions?

A: With eyes wide open. Haste makes waste.

Q: How should we choose Cloud providers?

A: With separation of duties between selection consultant and implementer.

BURNING CLOUD (SORT OF) ANSWERS

Q: What benefits should we expect?

A: Depends on which Cloud switches you flip, (see previous slides) and how well prepared you are when you flip them. (See our Tips, coming up)

Q: How will our team's jobs and responsibilities change?

A: Lots. Be sure you change intentionally; have a repurposing plan.

WHEN SHOULD YOU MOVE TO SAAS?

Risk →

Time →

Just Right

Platform Parity

Trained and Invested Workforce

Architect Mentality

Plan for Uninterrupted Innovation

Commodity Discount

Beaten Path On, Viable Path Off

Too Soon

Immature Platform

Skilled Resource Shortage

Herd Mentality

Must Jettison Innovation to Move

Bleeding Edge Premium

No Path Off the New Platform

Too Late

Stagnant Platform

Skilled Resource Shortage

Dinosaur Mentality

Culture of Innovation has Died

Escalating Costs

No Path Off the Old Platform

CASE STUDY: NORTHWELL HEALTH IMPLEMENTS ORACLE HCM CLOUD
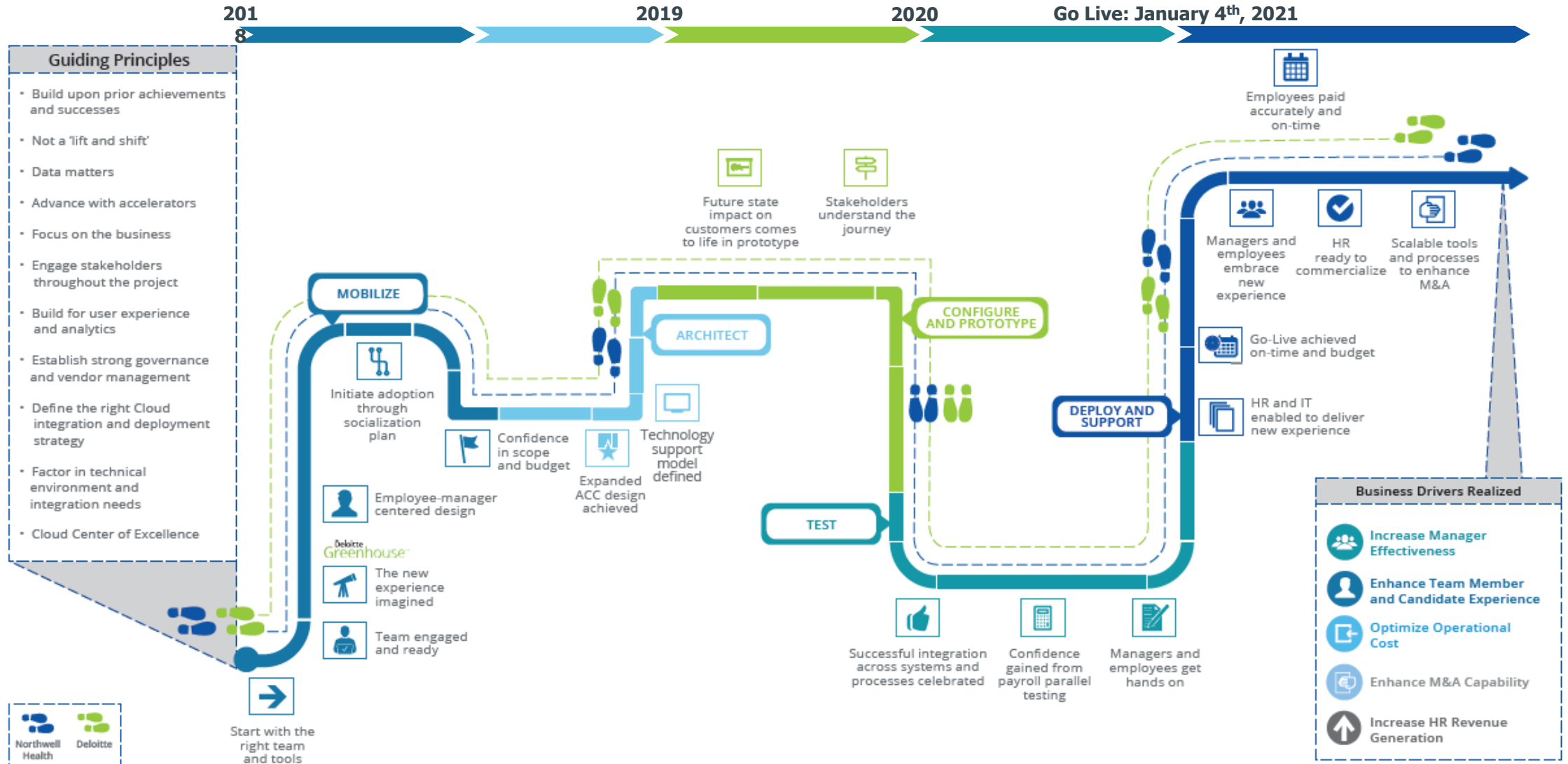
KEY ACCOMPLISHMENTS

Included many **first of a kind**, providing a leading class workforce experience in healthcare!

SCOPE

- **12 Modules**: HR, Payroll, Absence, Benefits, Comp, Helpdesk, Learning, ORC, Talent, Kronos, Finance & GL, Tax & Vendor*
- **Over 70,000** employees
- Big Bang Implementation*

DESIGN

- **5 Sprints**
- **129 process flows created**
- Changed from EVD to **Momentum**
- **116 Desktop Procedures** created leveraging Oracle Guided Learning

CAREER FRAMEWORK

- Took 6,744 current state job codes & titles to 1,959*
- Employee cascade completed virtually during the midst of a pandemic*

DEVELOPMENT

- Completed Development for +1,000 tech objects:*
  - 672 Fast Formulas
  - 168 Integrations
  - 150 Reports
- Over 390 FRICE related CRs completed

CONVERSION

- **12 Conversion cycles** successfully completed
- Near flawless execution of Mock and Production Cutover - remotely, in the midst of a pandemic*

SYSTEM INTEGRATION

- 7 System Integration Test Cycles Complete
  - **Over 5,000** Scenarios
  - **1701** End to End Steps
  - **116 integrations** tested with vendor
- 10m of records transferred each payroll w/ GL*

PAYROLL RECONCILIATION

- **Completed 3 PAR cycles with results above exit criteria!**
- All 3 cycles done remotely in the midst of a pandemic and resurgence*

USER ACCEPTANCE

- Includes total of 81 scenarios
- **25 MSS & 34 ESS** scenarios
- **200+ UAT participants** from SITE HR & COEs
- All cycles done remotely in the midst of a pandemic and resurgence*

NORTHWELL FIRSTS

- Named Fortune's "100 Best Companies to Work For"*
- Joined Netflix! In documentary, Lenox Hill*
- Treated the most Covid patients in the US*
- Administered the first COVID vaccine in the US!*

JANUARY 4th GO LIVE

- Jan 1st / 7:30am: Solution opened to HR – it's live*
- Large increase in catch up transactions due to resurgence*
- Jan 3rd: 1st payroll*
- Jan 4th: Solution available*

*First of a kind

LESSONS LEARNED

Project Polaris Lessons Learned

HyperCare & Sustainment

- Don't underestimate HyperCare and support model. Going live is not the end, but a new beginning
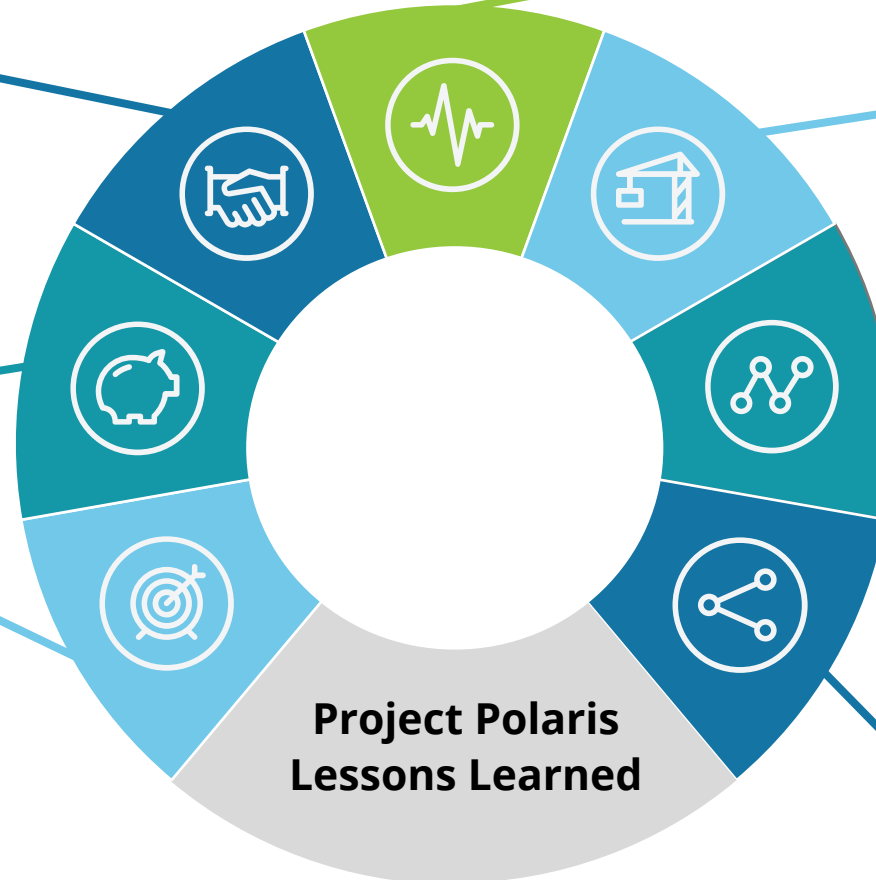
Bold Sponsorship

- Bold leadership stakeholders and change agents are key
- Integration partners that not only has the depth and breadth of experience, but also respectful of business culture to create a "one team" mindset

Business Driver

- Keeping a tight project timeline despite the change to deliver the project virtually
- Leverage data across the enterprise to gain insight and connect information

Budget & ROI

- Quarterly review process on ROI and customer satisfaction for a set of hard and soft progress metrics
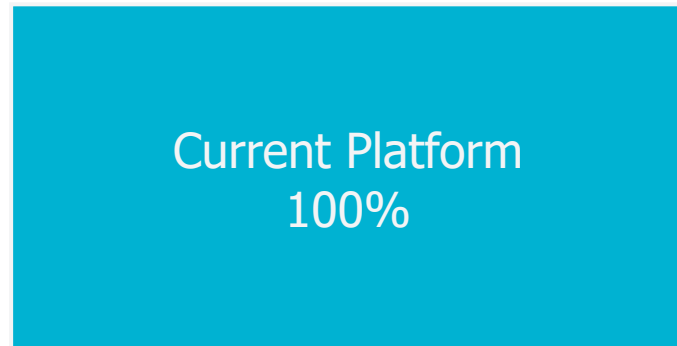
Agility in Approach

- Pivoted program to remote deployment approach
- Focus on speed to market – faster enhancements delivery
- Solution-driven approach by starting with what the cloud offers and then work to customize it based on specific needs … and customize less
- Identify harmonization executive sponsor and have the harmonization plan finalized prior to design
- Agility of collective team to deal with the pandemic and scope additions
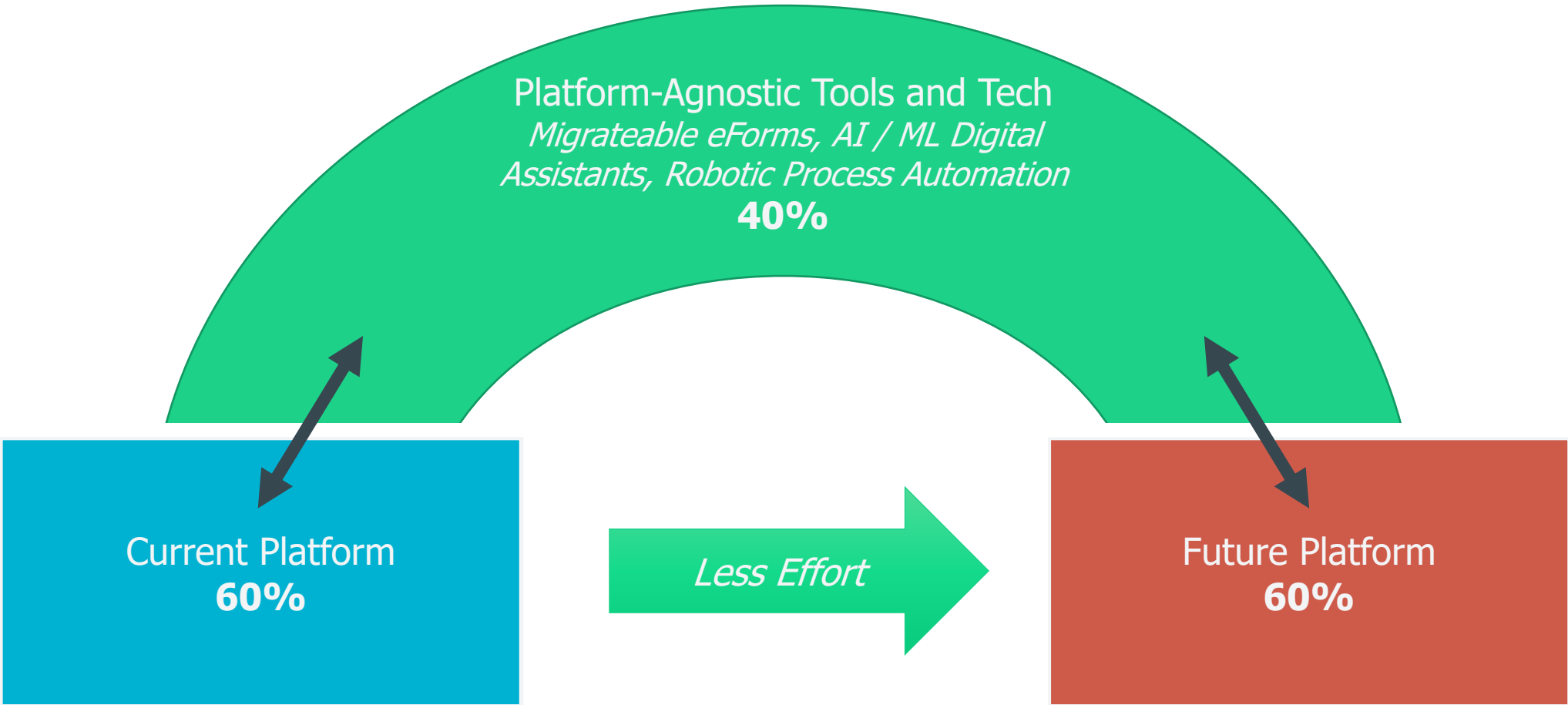- Test more than technology

Scope, Governance, & Staffing

- Redefining the technical scope and managing the associated risks
- Solid Decision Authority required for quick design decision making
- Reassessing mid-project if things are not going to plan
- Business resources are just as important as technical ones
- Expanded scope created risk to the program, increase cost, and required us to pivot on approach

Change Management

- Adoption. Power of collaboration
- Emphasize customer impact and seamless experience

Project Polaris Lessons Learned

3 (OF 8) TOP TIPS FOR CLOUD READINESS

1. BUILD A BRIDGE

Current Platform
100%

MORE EFFORT

Future Platform
100%

1. BUILD A BRIDGE – INVEST IN PLATFORM-AGNOSTIC TOOLS

- Conversational Artificial Intelligence (AI/ML)

- Robotic Process Automation (RPA)

- Process Automation / Configuration-based UI

- Data Aggregation / Business Intelligence / Data Visualization / Analytics

If you don't have a safe space for your custom functionality to live and grow, you aren't ready

If fear of support ending is a reason for re-platforming, reduce your dependency on the platform

2. REAP CLOUD BENEFITS INCREMENTALLY

(OR, DON'T SHIFT YOUR PARADIGM WITHOUT A CLUTCH)

- Cloud Migration – Twice Might be Faster than Once

- Managed Hosting Services – Why Wait? SaaSify PeopleSoft

- Delegate Development to a Trusted Partner

- DevOps – Continuous Delivery

- Update Look and Feel – Do You Really Want it to Look This Bad for 3 More Years?

- Pick PaaS tools that go where you're going – ODA, OGL, VBCS, ICS, AI/ML

3. REKINDLE THE FLAME WITH YOUR BUSINESS PROCESSES

- Get reacquainted with your business processes now – that knowledge is portable

- Truly efficient business processes are not platform-dependent

- Switching platforms doesn't automatically improve your process

- Fall in love with process efficiency before you get married to a new platform

GT eForms™ – Unparalleled Automation

ORACLE
Validated Integration
PeopleSoft

Build Configuration-based Custom Fluid Solutions

Configuration-based Form creation

Pre-Population

Conditional form behavior

Restricted valid values

Bulk actions

Attachment management

Configurable routing

Full PeopleSoft security

Edits & validations

Reporting & analytics

Transformative Results

- 700% Efficiency Increase
- Turnaround reduced from 5 days to 30 minutes
- Reduced manual intervention & errors to less than 1%
- Saved over 90% of time for new employee onboarding
- Direct year-on-year ROI over $300,000

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Empowering Users Through Mindful Automation

Auto-population and intelligent defaulting ensure accuracy, increase speed, and reduce the amount of data required of the user

Easy access to forms, form status and form data empowers users with on-demand information and reduces calls to the help desk

Related displays provide meaningful information to the user

Conditional routing and email notifications ensure compliance and accelerate turnaround

Restricted prompt values simplify choices and remove opportunities for error

**Conditional logic** guides the user, hiding complexity and reducing need for training and documentation

Field attributes and form layout define an intuitive user experience

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MEET IDA
INTRASEE'S DIGITAL ASSISTANT

- Enterprise-grade digital assistant
- Uses machine learning AI
- Built on Oracle's AI and Cloud
- Scalable to thousands of questions in over 100 languages
- Authenticated and non-authenticated chats
- Multi-channel capable (Web, Teams, SMS, etc)
- Pre-built catalog of questions/skills/integrations
- Integration adapters such as PeopleSoft, HCM Cloud, Microsoft, ITSM, LMS
- Add questions, answers and topics
- Conversational satisfaction surveys
- Role-specific & personalized answers
- Alerts, nudging and suggestions
- Automated deployment and testing (no expensive staffing/consulting!)
- AI that gets smarter over time

IntraSee, a Gideon Taylor division
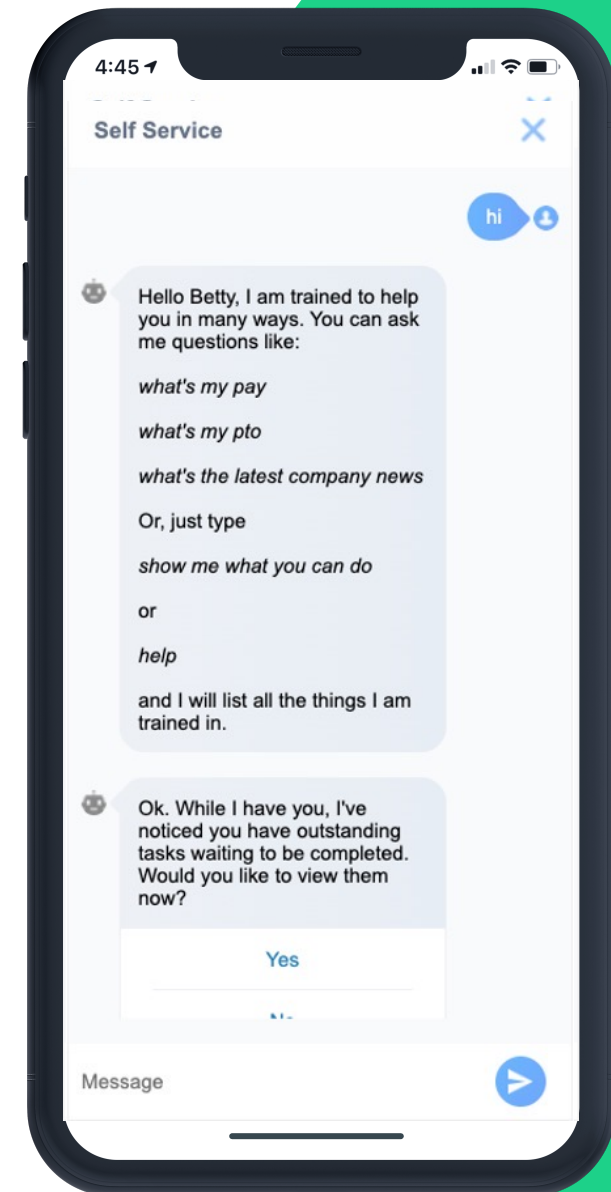
Enabling Smart PeopleSoft Automation

Transforming and Extending PeopleSoft

ORACLE
Validated Integration
PeopleSoft

The UNIVERSITY of OKLAHOMA Health Sciences Center
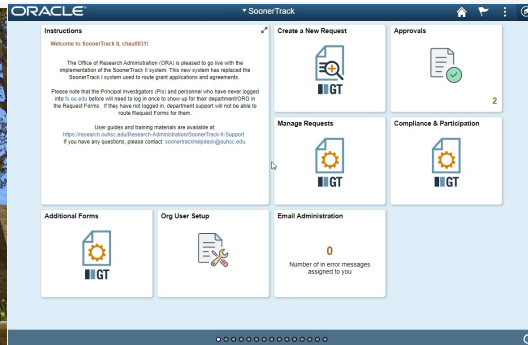
- Built integrated platform using GT eForms for managing complex grant approval process.
- Measurable improvements in accuracy, efficiency, and user experience.
- GT eForms is a powerful, custom Fluid application builder, created entirely with PeopleTools to extend PeopleSoft.

Seneca
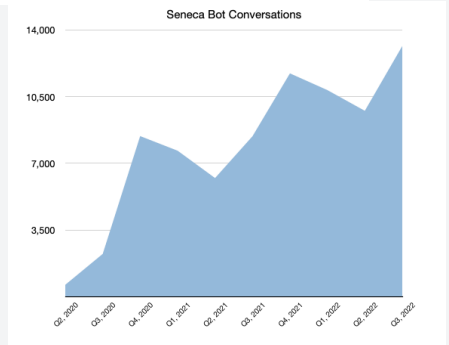
- Sam, Seneca's new assistant, has completed over 100,000 user-support needs in just the past 12 months.
- Ida leverages the power of Oracle Digital Assistant
- Generated over $2 million USD in ROI opportunity by decreasing per-transaction cost from $19.00 to $1.00 per session.

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