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PeopleSoft
RECONNECT

SESSION ID: 103230

# MOVE TO CLOUD, MAKE USERS HAPPY, SAVE MONEY: IN WHAT ORDER?

MAY 9, 2023

PeopleSoft
RECONNECT
AT BLUEPRINT4D LIVE!

# 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 | | 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 |

# Some of our Clients…

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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

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# Giving Your Enterprise a Voice

## Delivering on the Promise of Enterprise Technology

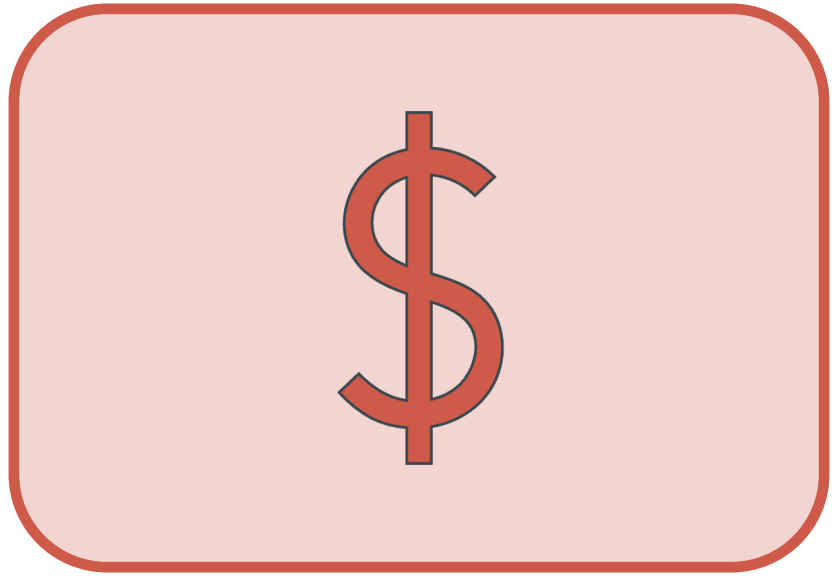
Gideon Taylor enables clients to envision and create custom solutions for eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, WebUX and conversational AI.

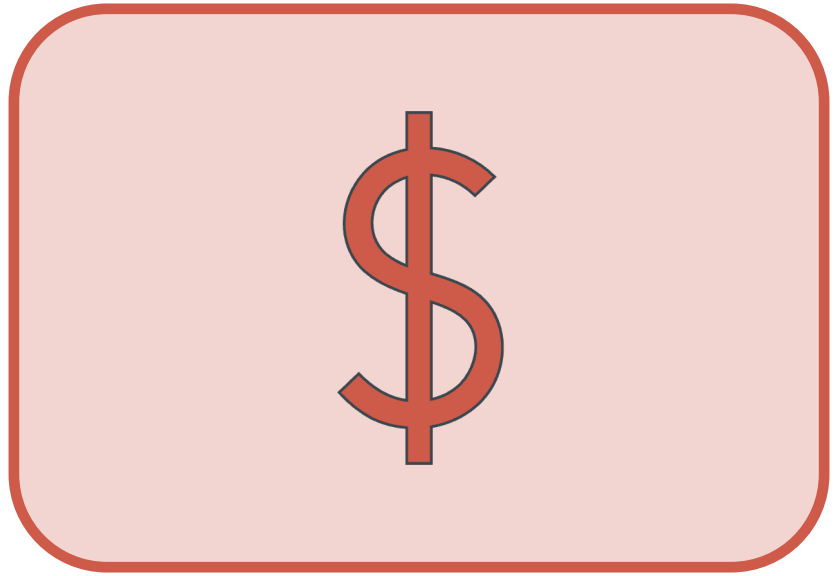
## **Founded in 2001,** based in American Fork, UT

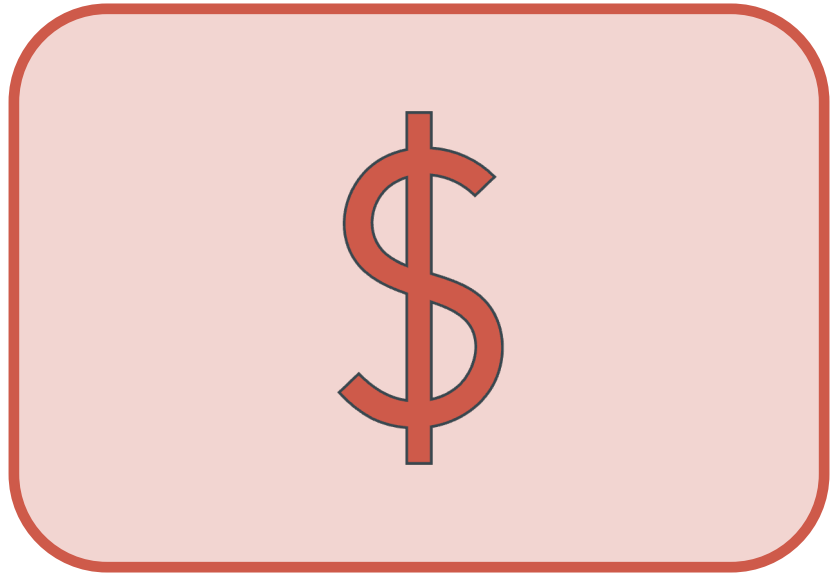
Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations.

ORACLE | Partner

UiPath™ Partner SILVER







So, should a cloud move be top Priority?

# CONVENTIONAL WISDOM: ALL YOU NEED IS CLOUD

"You should already be there; if you're not on a Cloud-based SaaS platform, you're behind."

"Moving to the Cloud will fix my business processes and user experience."

**CLOUD!**

**Cloud-based,**

**Cloud-enabled,**

**Cloudy Cloudiness**

"Moving to the Cloud will save so much money!"

"Any investment in your current platform is a waste."

"Cloud Apps use Best Practices, which are better than our way."

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

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

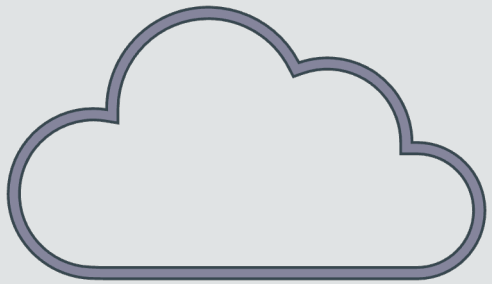
**PaaS - Platform as a Service**
*Build and run solutions using rented tools*

**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



How about user joy? Most important?

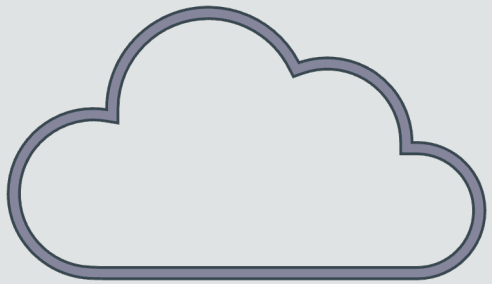
But what is it that is making this smiling user happy? What do these mythical beings really want? (And not want?)

## WHAT USERS LIKE

- Being productive
- Making a difference
- Clarity
- Consistency
- Being considered
- Being successful

## WHAT **DON'T** USERS LIKE

- Stress
- Ambiguity
- High-repetition tasks
- Low-value tasks
- Stagnation
- Failure
- Change

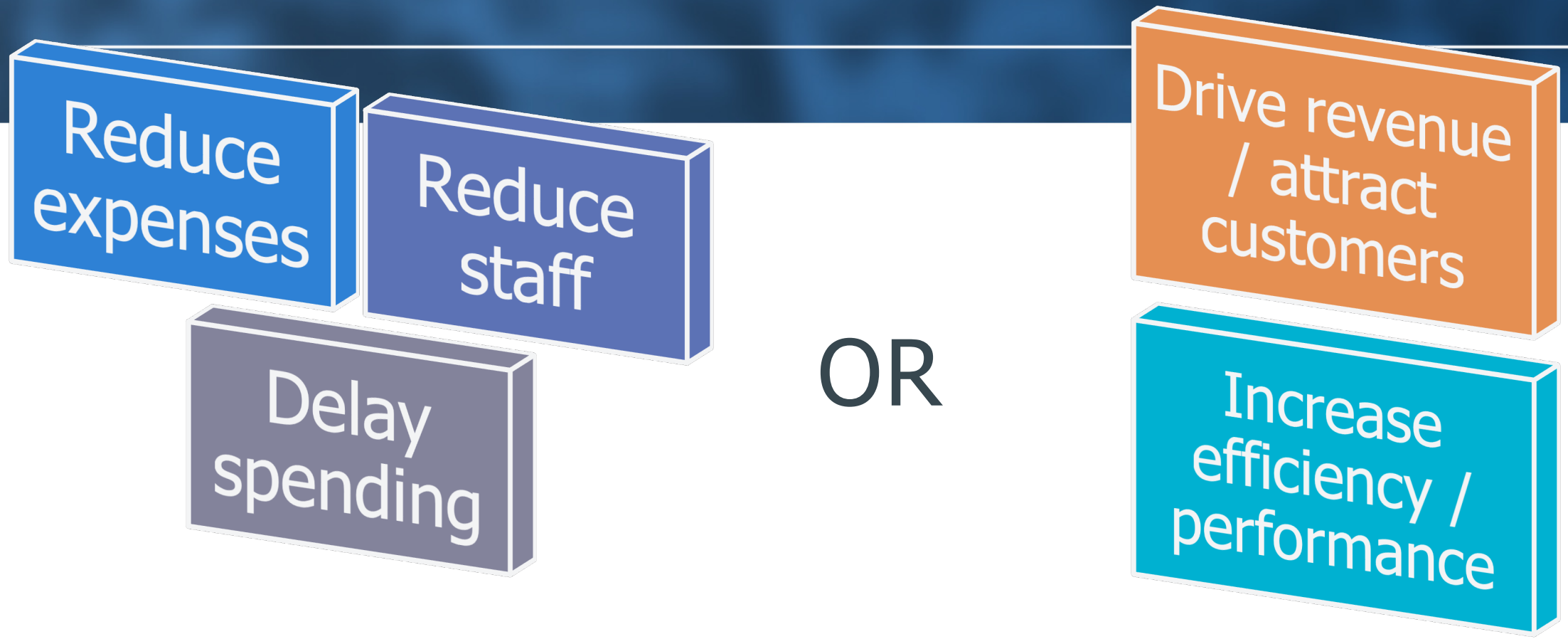


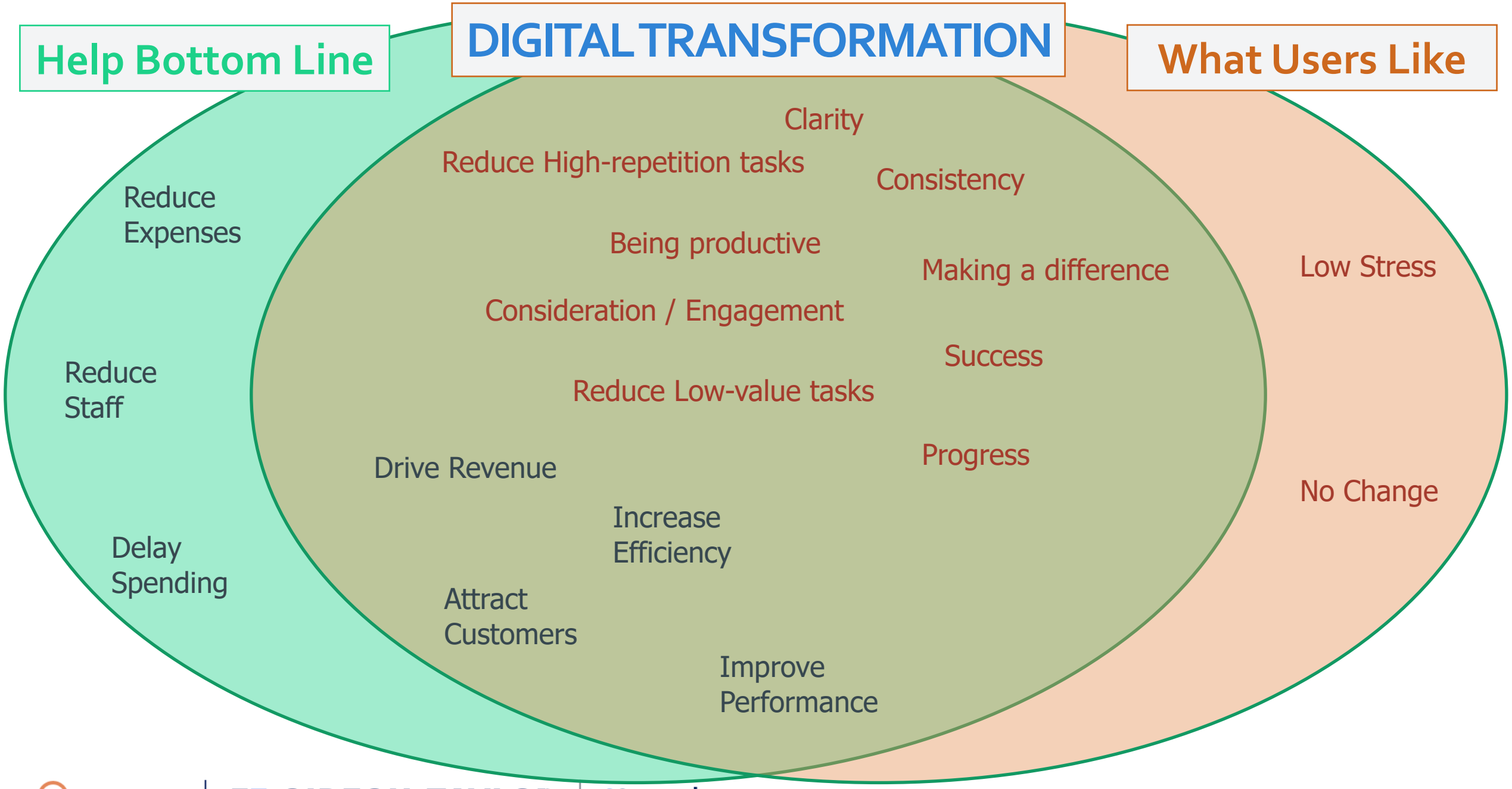
Isn’t money the bottom line? By definition?

‘Saving money’ looks at only one side of the coin. (Pun intended.)

We need to think about the financial return on the decisions we make. (ROI)

# TO IMPACT THE BOTTOM LINE, WE CAN…



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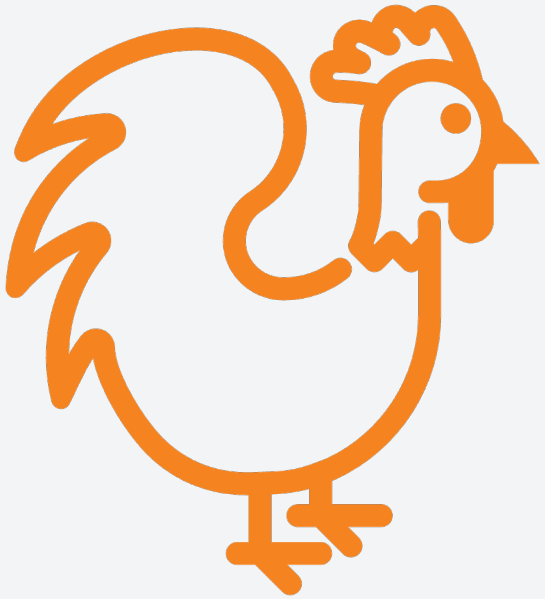
# SO WHICH COMES FIRST…



## Digital Transformation, or

## Replatforming on SaaS?

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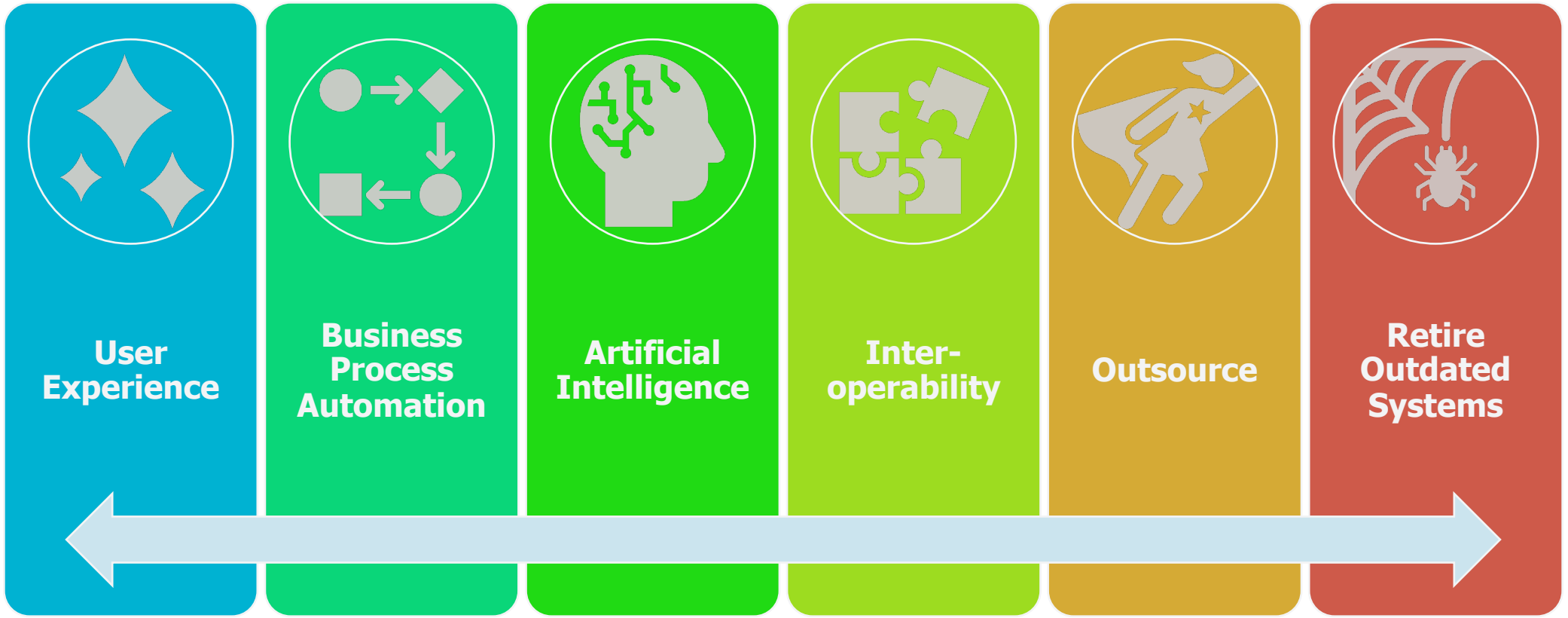
# Can Digital Transformation Happen Before SaaS?



# WHEN SHOULD YOU MOVE TO SAAS?

Risk

## Too Soon

Immature Platform

Skilled Resource Shortage

Herd Mentality

Must Jettison Innovation to Move

Bleeding Edge Premium

No Path Off the New Platform

## Just Right

Platform Parity

Trained and Invested Workforce

Architect Mentality

Plan for Uninterrupted Innovation

Commodity Discount

Beaten Path On, Viable Path Off

## Too Late

Stagnant Platform

Skilled Resource Shortage

Dinosaur Mentality

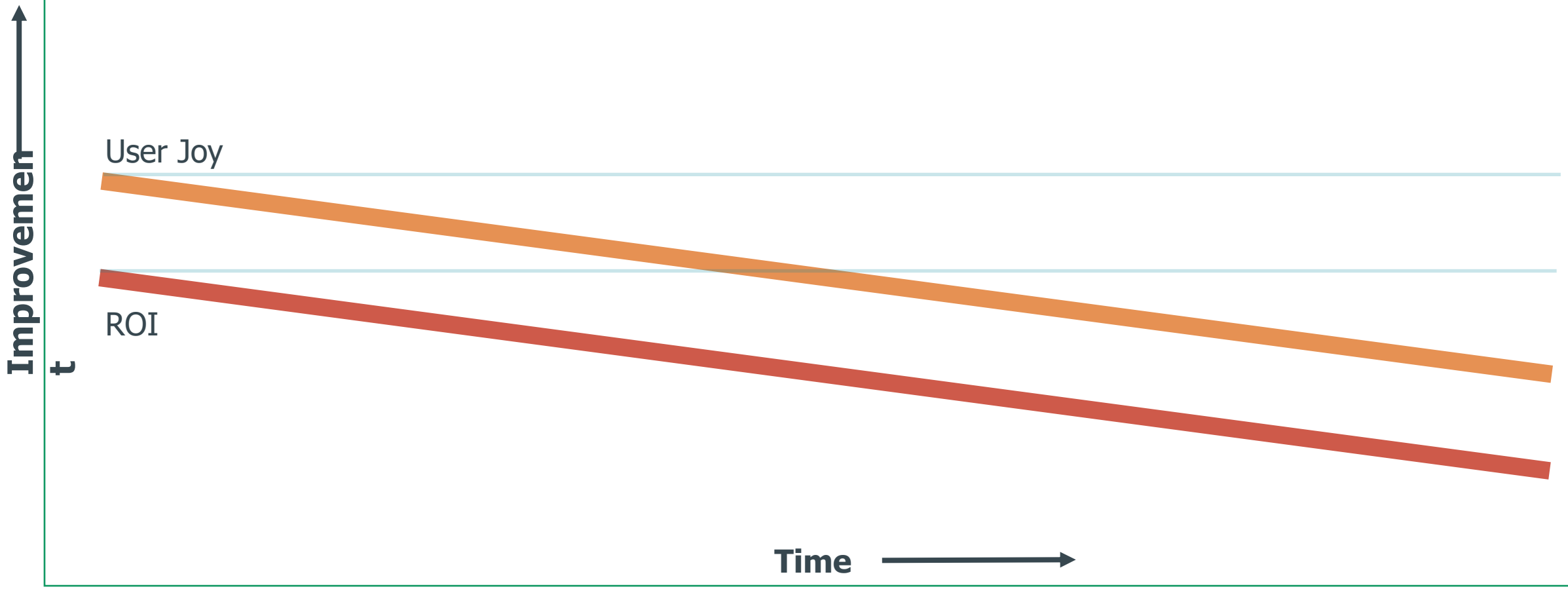
Culture of Innovation has Died

Escalating Costs

No Path Off the Old Platform

Time

# Let’s just wait. On everything.

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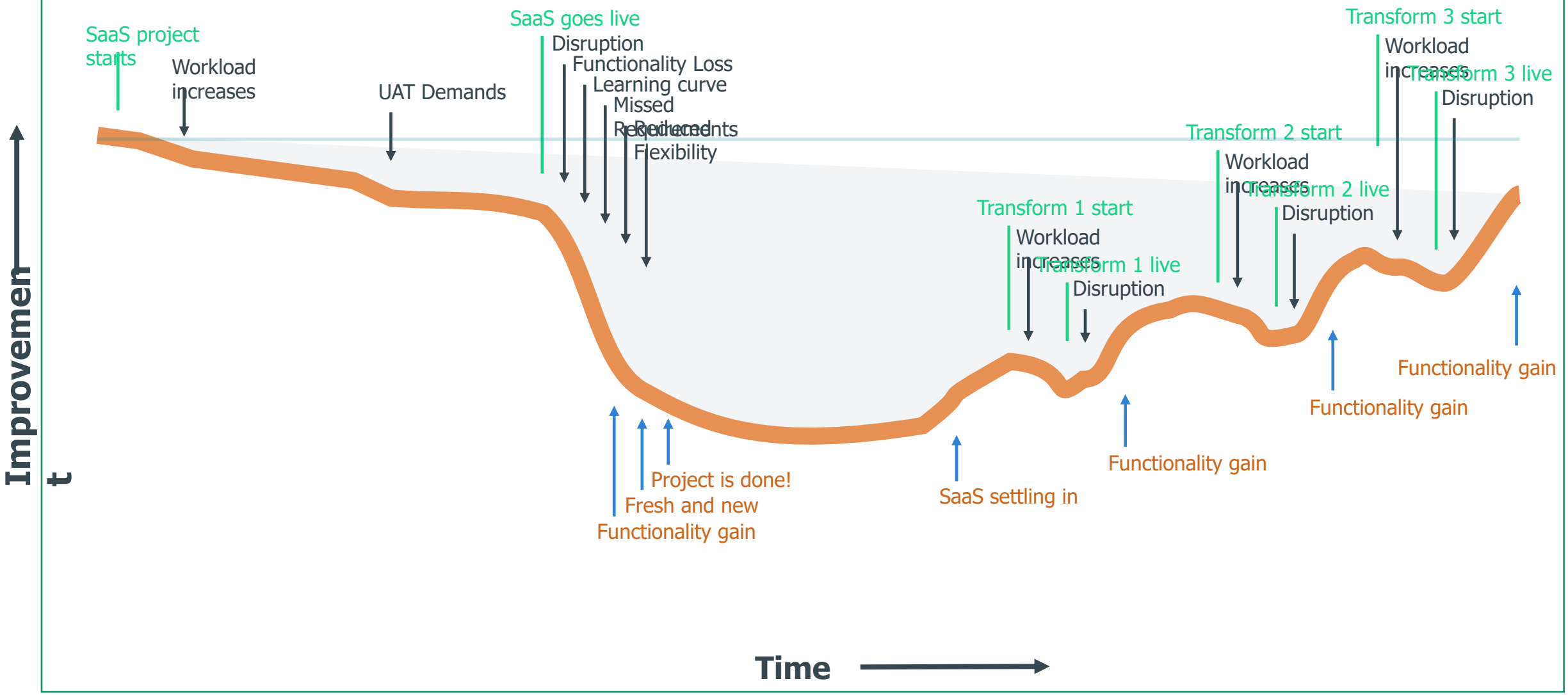
# Okay then, replatform on SaaS first.

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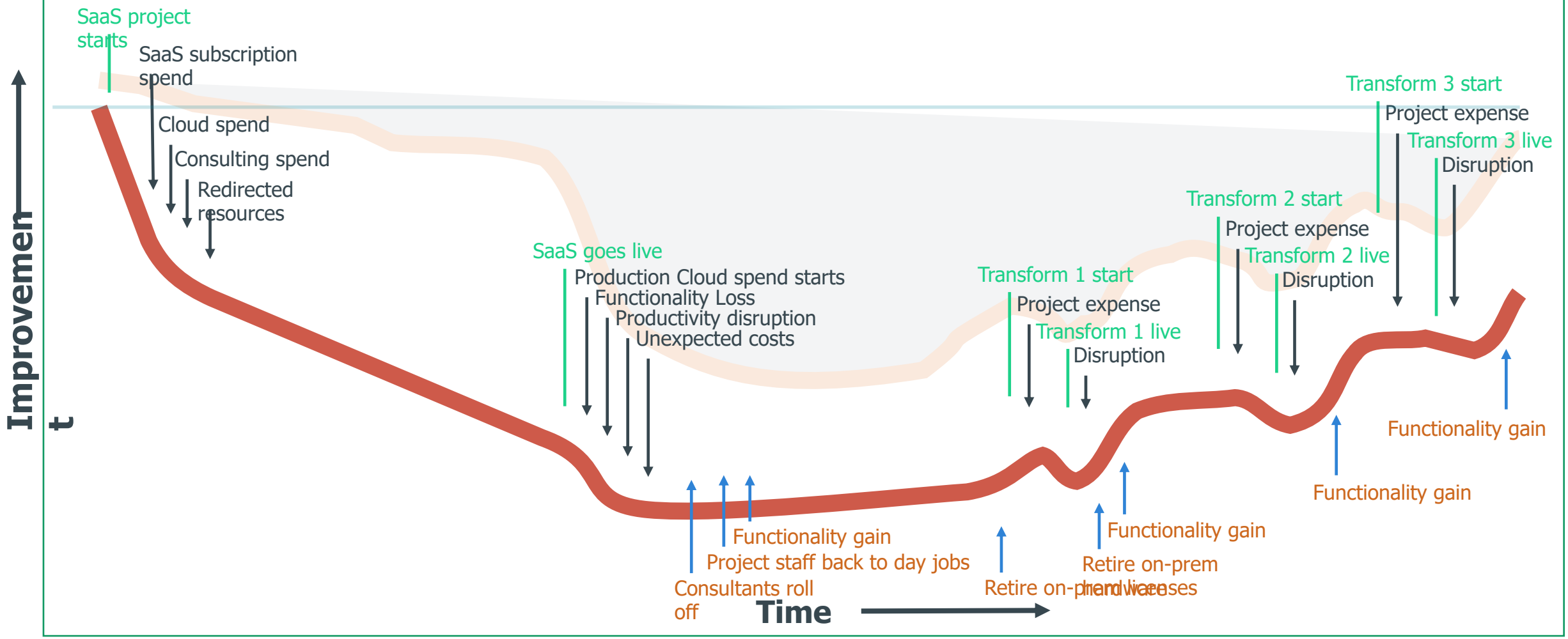


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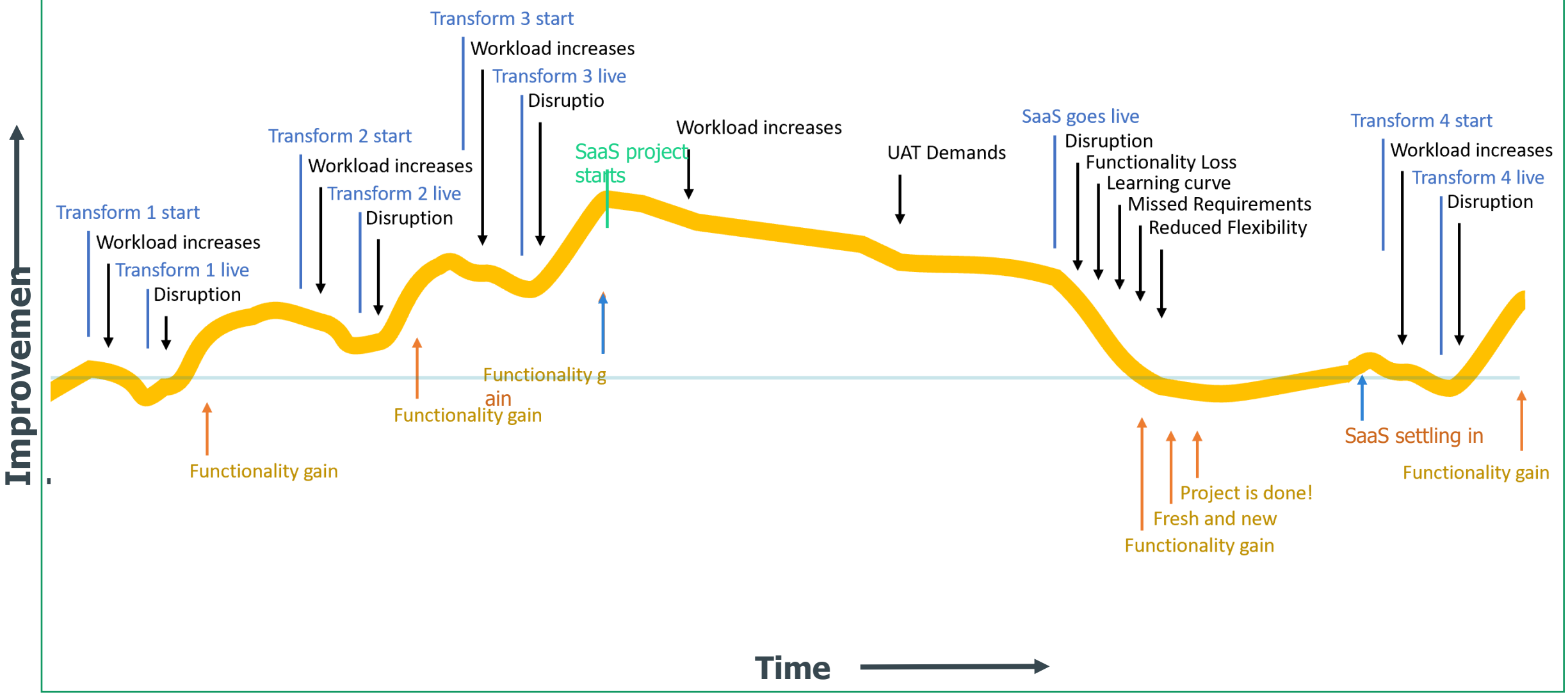
# Um, okay, transformation first then?

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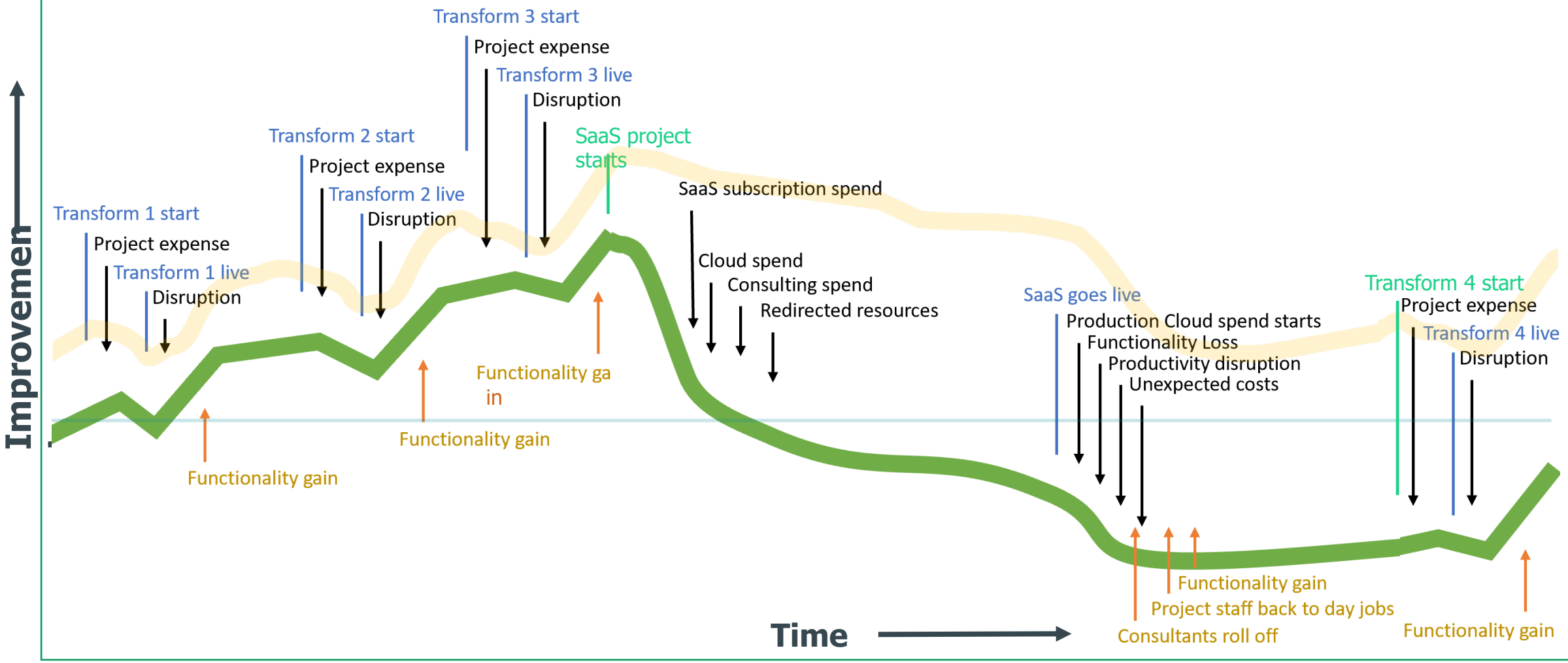


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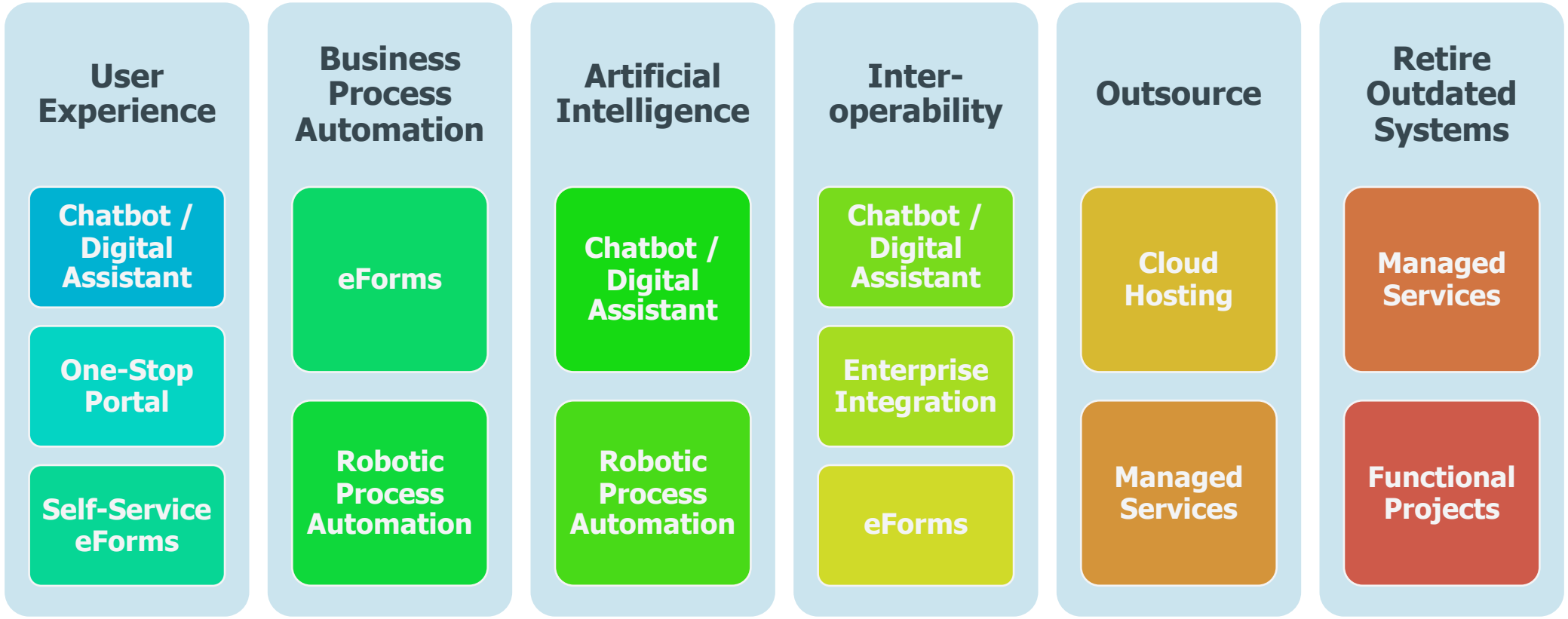
# Alternative Wisdom: Focused, Portable Tools & Solutions

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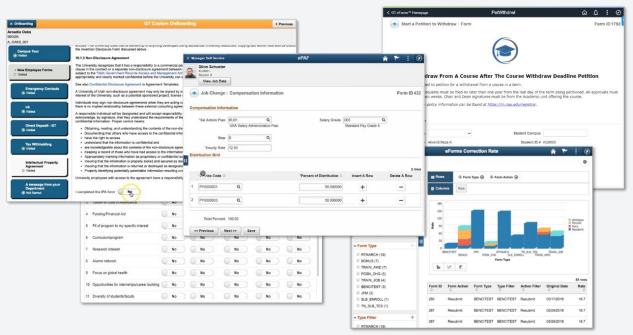
# Powerful Tools for Custom Automation



## GT eForms™

Configuration-based form creation

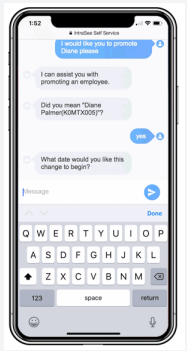
Native ERP integration

Configurable routing, notifications

Attachment management

Edits, validations

Conditional logic



## Ida Digital Assistant

Enterprise-grade digital assistant

Uses machine learning AI

Built on Oracle's AI and Cloud

Multi-channel capable (Web, Teams, SMS)

Role-specific & personalized answers

Pre-built catalog of questions/skills/integrations

## UiPath

Robotic Process Automation

Simulates Human Actions

Quick to implement

Enterprise scalability

Fills in forms, Moves files, Reads & enters data, Opens & sends emails

# Transforming and Extending the Peoplesoft Experience with GT eForms

ORACLE Validated Integration PeopleSoft

HEUG

North Dakota University System

**Enrollment**: 55,000 across 11 campuses

**Key Achievements:**

- Went live with over 120 new Campus Solutions eForms in July – Largest single go-live ever
- Dozens more on the roadmap for HCM and CS
- Little to no GT assistance

University of CA, Berkeley

**Enrollment**: 45,000

**Key Achievements:**

- **2019 PeopleSoft Innovator Award** for rapid Fluid deployment using eForms
- Dozens of student and faculty eForms
- Thousands of person hours saved each year

Los Rios Community College

**Enrollment**: 70,000 across 4 colleges, 6 education centers

**Key Achievements**

- Creating eForms in HCM and CS; over 100 form types planned
- Initial scope replaced 9 PS Forms with GT eForms
- Over 50,000 eForms initiated in the first 90 days

Princeton University

**Enrollment**: 8,600

**Key Achievements:**

- Creating eForms in HCM and CS
- Created and launched 16 new eForms in 90 days
- **COVID-19**: Design to Production with two student eForms in less than 24 hours

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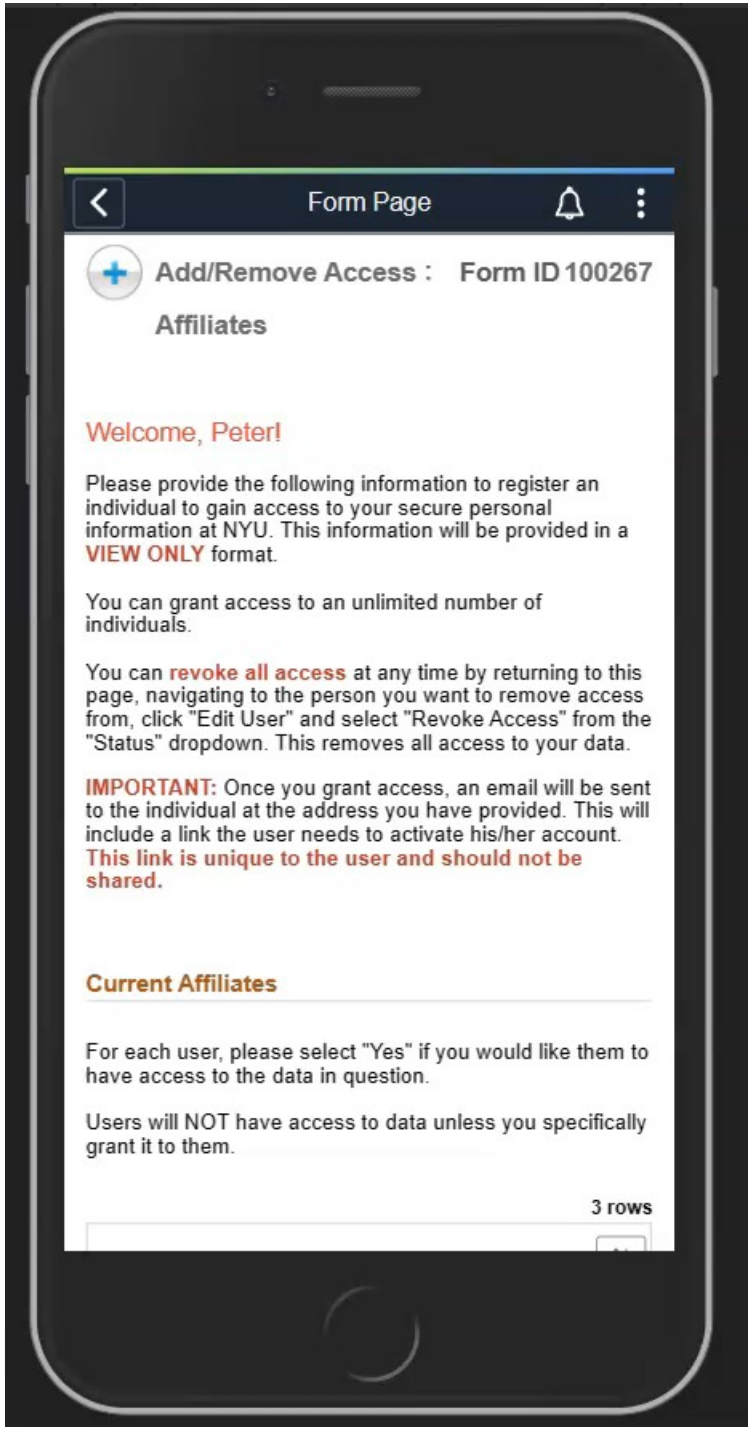


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# Transforming and Extending the Peoplesoft Experience

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## IMPLEMENT & UPGRADE

**Department of Energy Company using PS HCM, FSCM**

**Key Achievements:**

- Divested from Savannah River National Site
- Stood up independent instance of PeopleSoft
- Upgraded Tools and Image
- Developers retrofitted customizations needed

## OPTIMIZE & SUPPORT

**Leading staffing organization with PS HCM, FSCM**

**Key Achievements:**

- Over 10 years of PeopleSoft enhancements, upgrades, and production support
- Executive road mapping and evaluations for systems strategy
- Ongoing implementations of new modules and image features

## MODERNIZE

**Largest Health Provider in Atlanta, GA**

**Key Achievements:**

- Modernized position control and recruiting system using PS Fluid and integration technology
- Self-service benefits administration with modern UI and mobile access

## MOVE TO CLOUD

**Fleet payment processing services**

**Key Achievements:**

- Move development, test and production environments to cloud hosting
- Upgrade PS FSCM to v9.2

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## SCHEDULE MY DEMO!

## PLAY TO WIN $500!

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# Questions?

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# GT eForms™ – Unparalleled Automation

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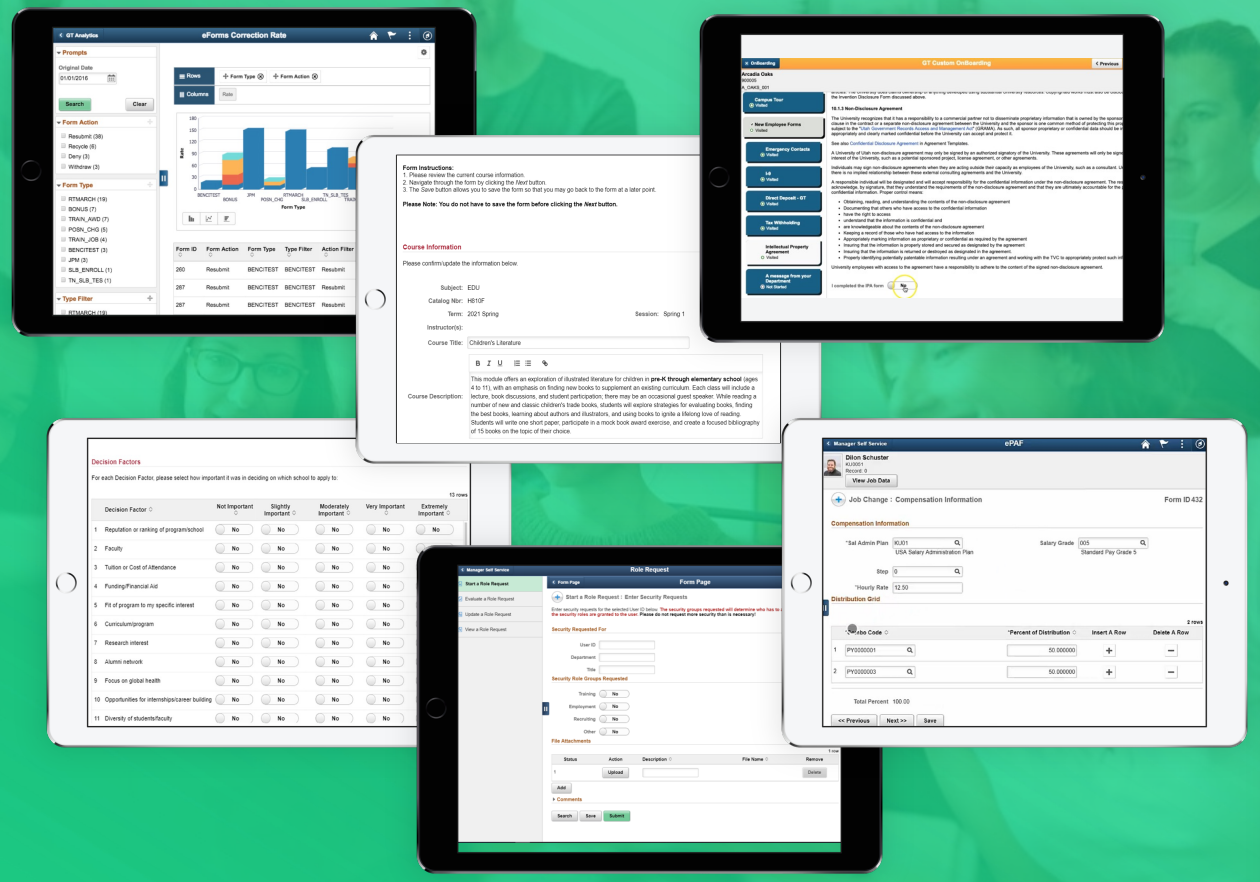


## Build Configuration-based Custom Fluid Solutions

- 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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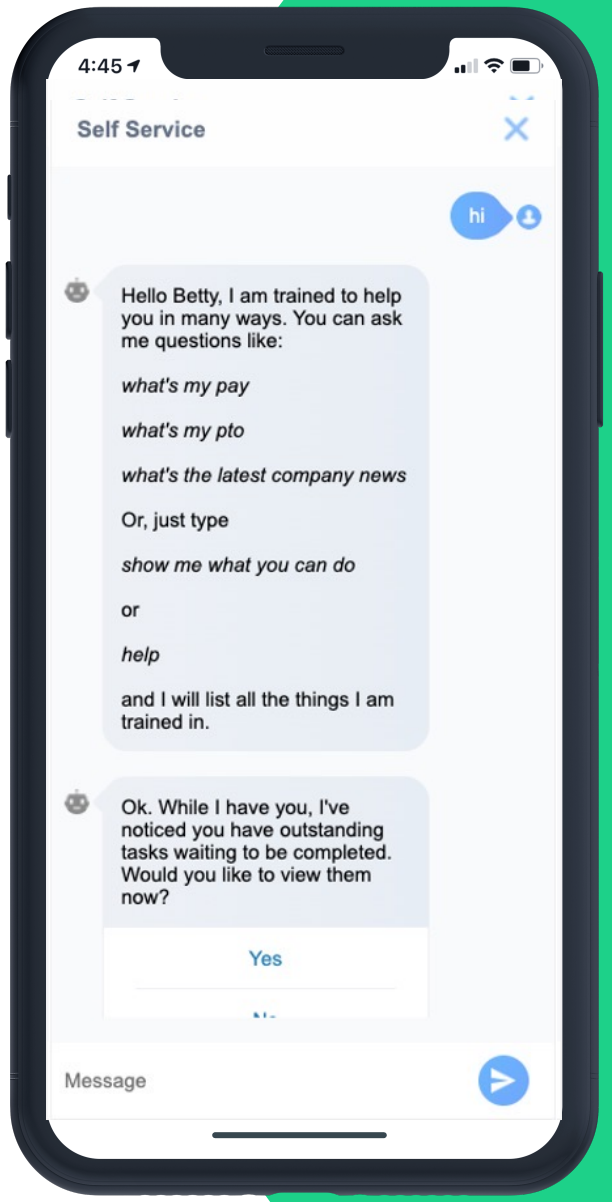
# MEET IDA

## 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



# Enabling Smart PeopleSoft Automation

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# Transforming and Extending PeopleSoft

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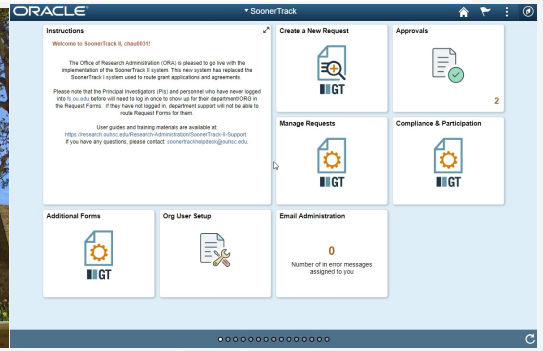
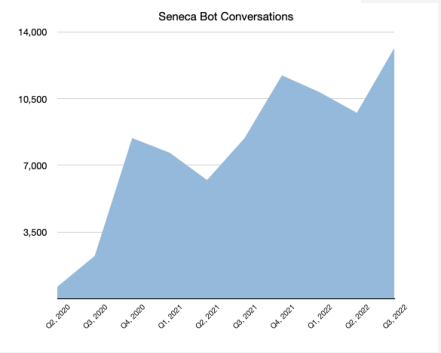
## The UNIVERSITY of OKLAHOMA Health Sciences Center




- 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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# At Quest, you belong.

Swap stories, ask questions, find answers
and learn from the PeopleSoft community.

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## The PeopleSoft community offers:

### Event Hubs

Browse 145 digital sessions from RECONNECT 22 or dig into other past conference content, organized by track or hot topic

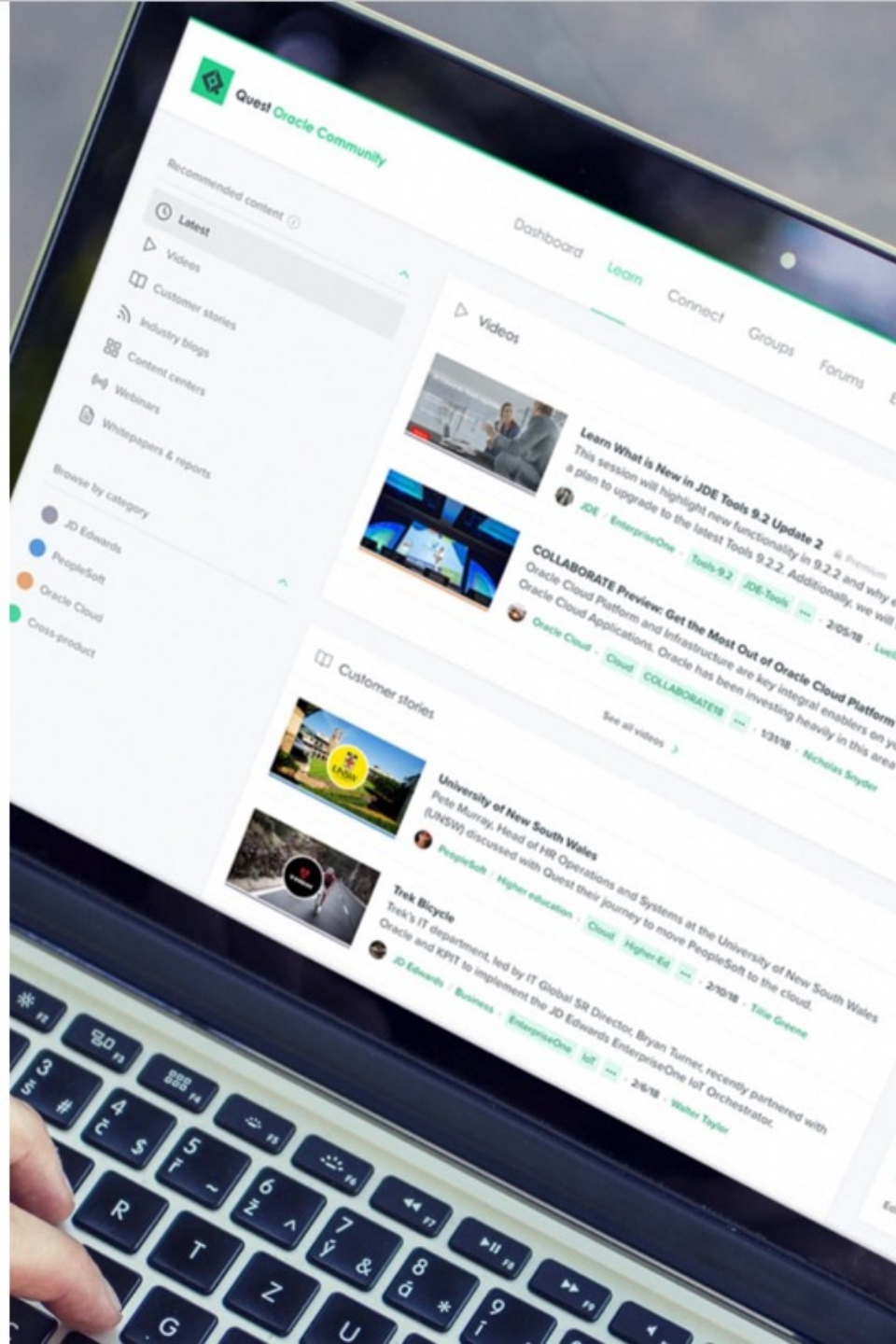
### Special Interest Groups

Take your pick of 30 informal PeopleSoft discussion groups including General Ledger, Payroll, Financials, Tech and a host of other hot topics, including dedicated industry groups.

### Strategic Content Centers

Expand your PeopleSoft knowledge on Kibana, PICASO, PeopleTools, Selective Adoption and other hot topics

**Learn more at questoraclecommunity.org/membership**



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# RECONNECT

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**OCTOBER 24 - 27, 2023**

**REGISTRATION OPENS IN MONTH**

3 JAM-PACKED PEOPLESOFT DAYS --
BRING THE TEAM AND SAVE!

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