

SESSION ID 103110

5 Great Ways to Supercharge PeopleSoft!

MAY 10, 2023

SCOTT CRUTCHFIELD

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

Agenda



- Industry Direction – Oracle’s Message
- 5 Great Ways to Supercharge PeopleSoft!
- Q&A

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



Giving Your Enterprise a Voice

Delivering on the Promise of 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.

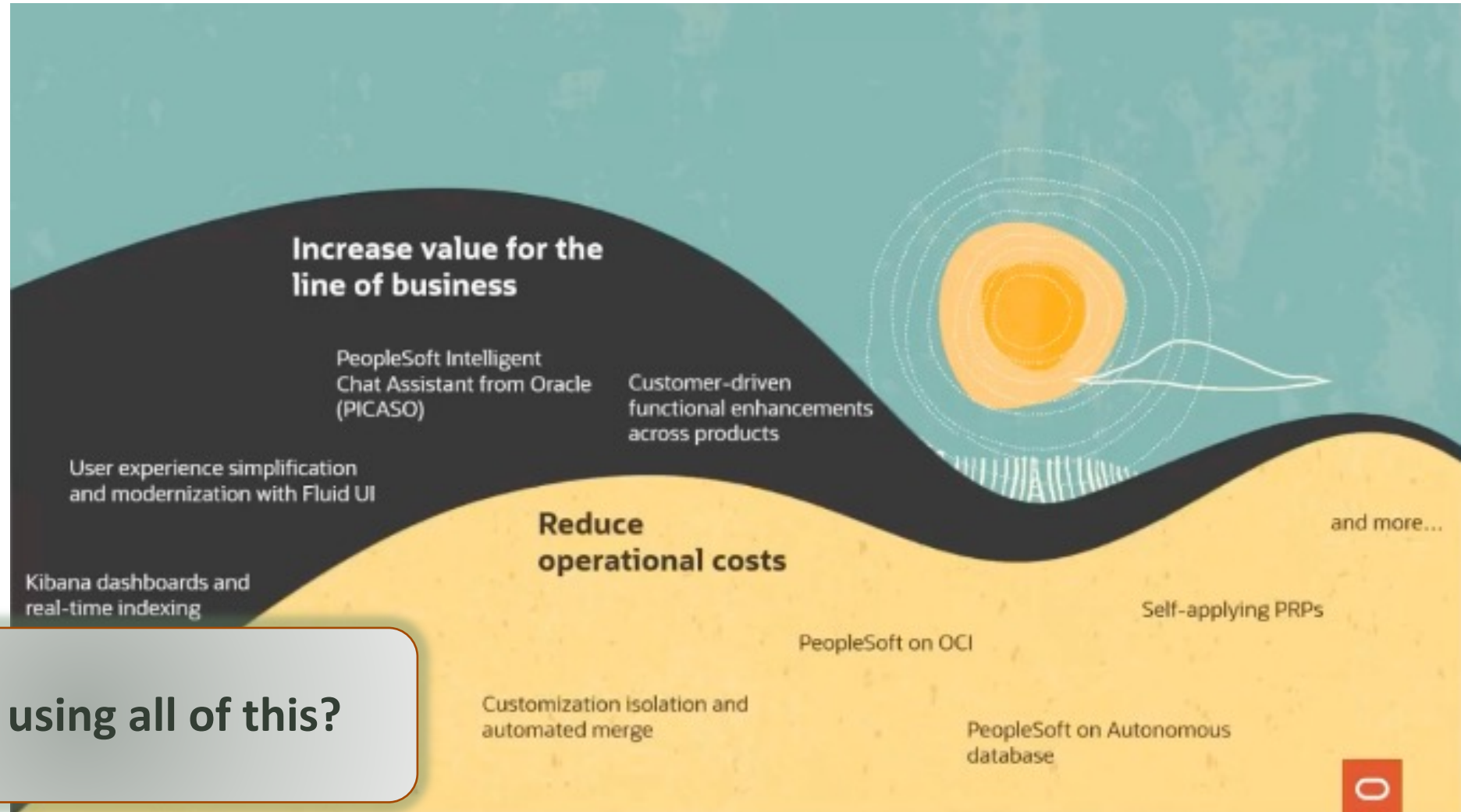
ORACLE

Partner



Oracle's Message

- PeopleSoft has already addressed User Interface challenges – ALL Fluid Now!
- PeopleSoft is completely Cloud Ready
- Oracle's update strategy for PeopleSoft will continue to release valuable features that are easy to adopt



Today's PeopleSoft

The Future is Now

Today's PeopleSoft Has Come a Long Way

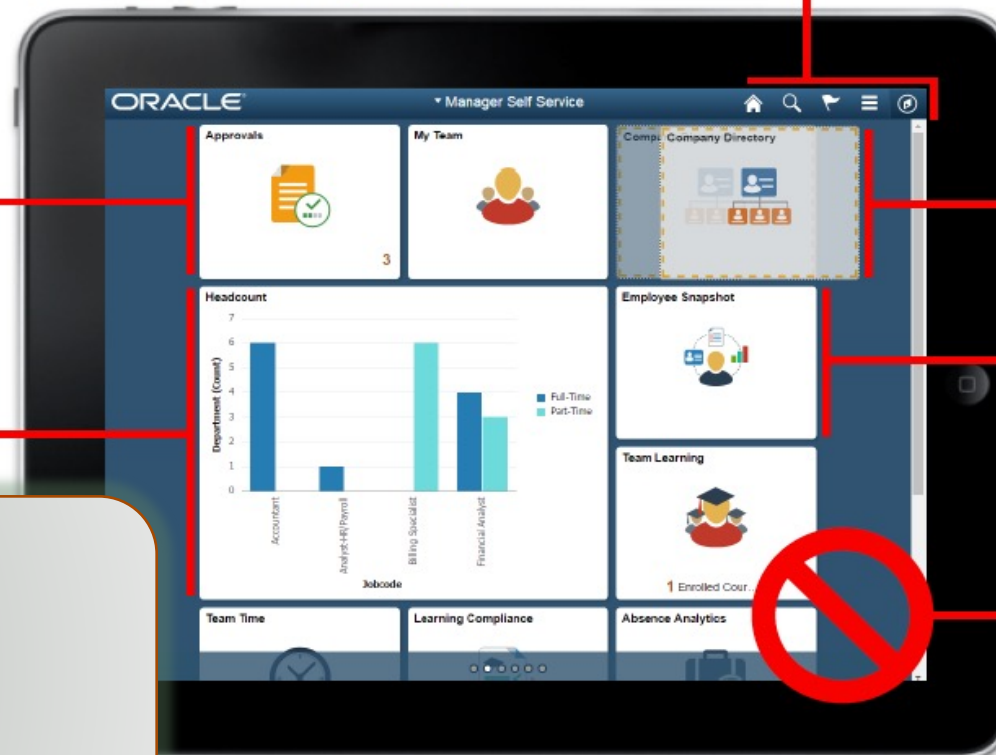
- Simple, Intuitive, Mobile User Experience
- Agile Innovation of Business Functions
- Low Cost, Responsive Development Operations

Intuitive, Mobile User Experience

Actionable, Embedded Analytics

Our View:

- Easy to configure PeopleSoft usability
- Easy to add visual, actionable elements
- Users can achieve more results in less time



Global Search, Alerts, Notifications

Flexible and Personalizable

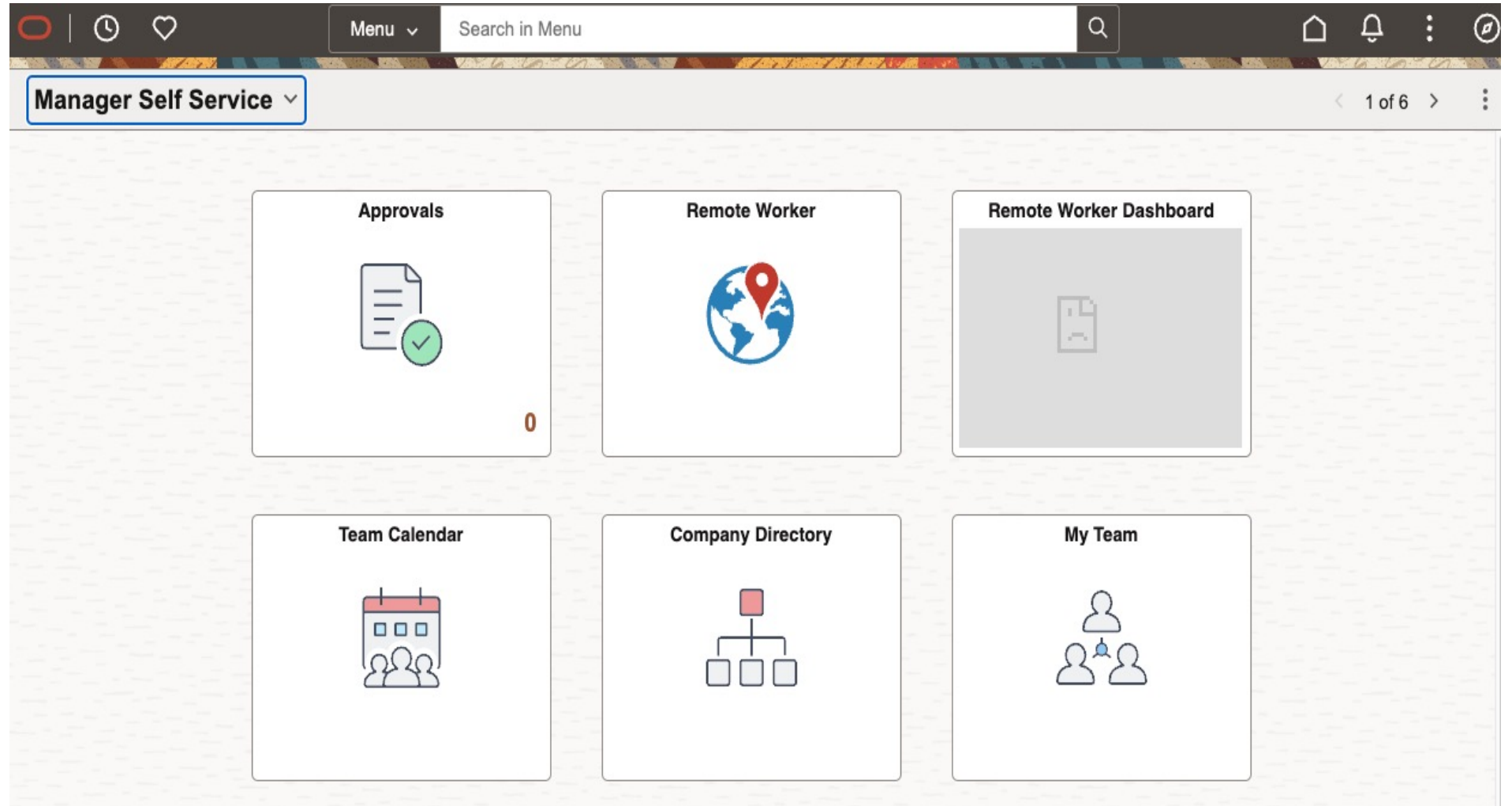
Selective Adoption of New Features

No Applications Upgrades Needed

PeopleTools – Key Features

| PeopleTools Release | General Availability Date | Patches and Platform Certifications Through (12 mo after GA of next release) | CPU Delivered Through | Key new Frameworks |
|---------------------|---------------------------|---------------------------------------------------------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------|
| PeopleTools 8.51 | September 10, 2010 | October 28, 2013 | October 28, 2014 | WorkCenters |
| PeopleTools 8.52 | October 28, 2012 | February 1, 2014 | February 1, 2015 | Pivot Grids |
| PeopleTools 8.53 | February 1, 2013 | July 11, 2015 | July 11, 2016 | Activity Guides |
| PeopleTools 8.54 | July 11, 2014 | September 4, 2016 | September 4, 2017 | FLUID, Homepages, Tiles |
| PeopleTools 8.55 | September 4, 2015 | June 9, 2018 | June 9, 2019 | Simplified Analytics, Elastic Search, PeopleSoft Cloud Mgr |
| PeopleTools 8.56 | June 9, 2017 | September 21, 2019 | April 30, 2021* | Classic+, PTF Query based Testing, Unified Navigation, PUM enhancements |
| PeopleTools 8.57 | September 21, 2018 | December 18, 2020 | December 18, 2021 | Personal Analytic Notification, Related Content Analytic Pane, Drop Zones, Kibana Support |
| PeopleTools 8.58 | December 18, 2019 | <i>April 8, 2022</i> | <i>April 8, 2022</i> | Chatbot support, enhancements everywhere |
| PeopleTools 8.59 | April 8, 2021 | <i>October 15, 2023</i> | <i>October 15, 2024</i> | <i>Search Centric, Menu Search, Real Time Indexing, Notification Panel</i> |
| PeopleTools 8.60 | October 15, 2022 | <i>8.61 release + 12 mo.</i> | <i>8.61 release + 24 mo.</i> | <i>Global Search, Notifications, Configurable Search, Lifecycle Management & Integration Enhancements</i> |

Today's PeopleSoft



Look Familiar?

Feel Productive?

There's a Better Way!

What's Important to Users?

What improvements to our Business Processes should we focus on?

Productivity

Productivity = Work Completed / Time

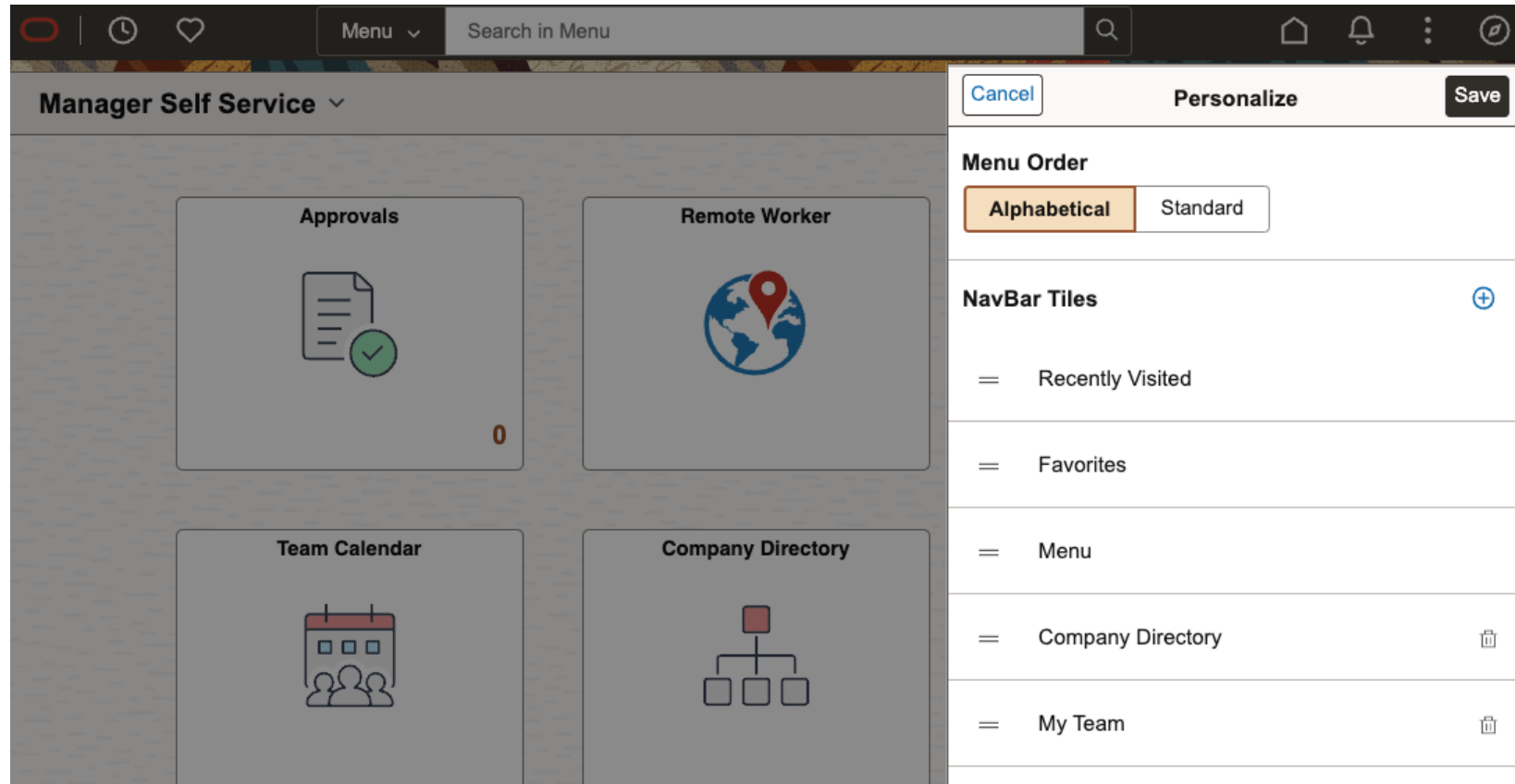
Efficiency

Efficiency = Work Completed / Energy Used

Enjoyment & Satisfaction!

Navigation Enhancements – 8.60

- UI Changes
 - Global
 - Contextual
- Quick Access Bar
 - Recently Visited
 - Favorites
- Global Search
 - All pages
 - Home - Expanded
 - Dashboard, Transaction – Muted
- Configurable Search
 - Reduce dependency on App Designer
- Mark Notifications
 - Mark Complete Button



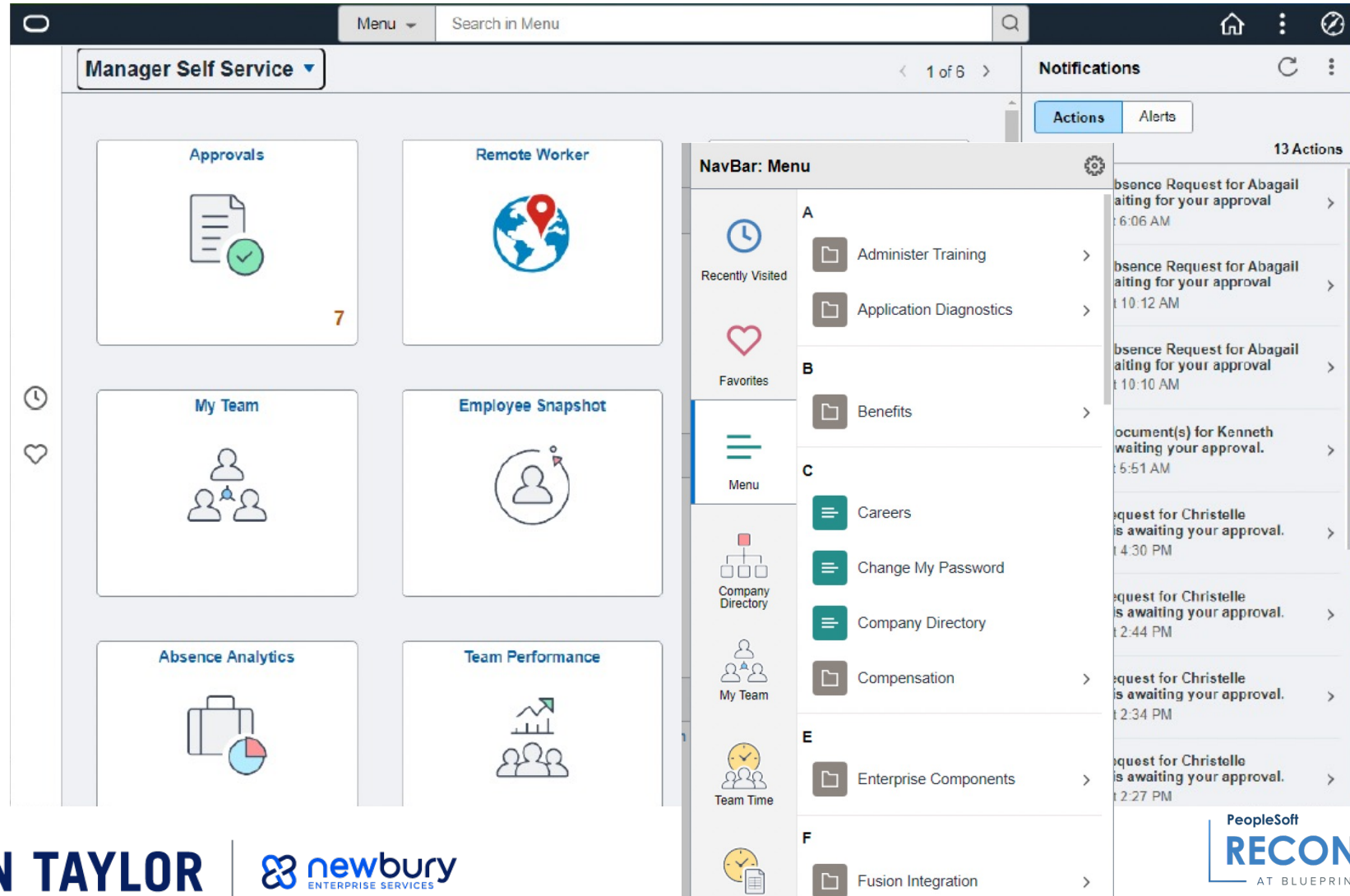
Fluid Navigation – Homepage Optimization

Search First! Menu Search, Component Search, Keyword Search, Search Suggestions

- Quick Access Bar
 - Recently Visited
 - Favorites
- Notifications Panel
- NavBar & Menu Improvements
 - Menu Item Labels & Descriptions
- Global Search
- Real-time Indexing

Find the data and actions that are most important to each user

Use Search for primary navigation



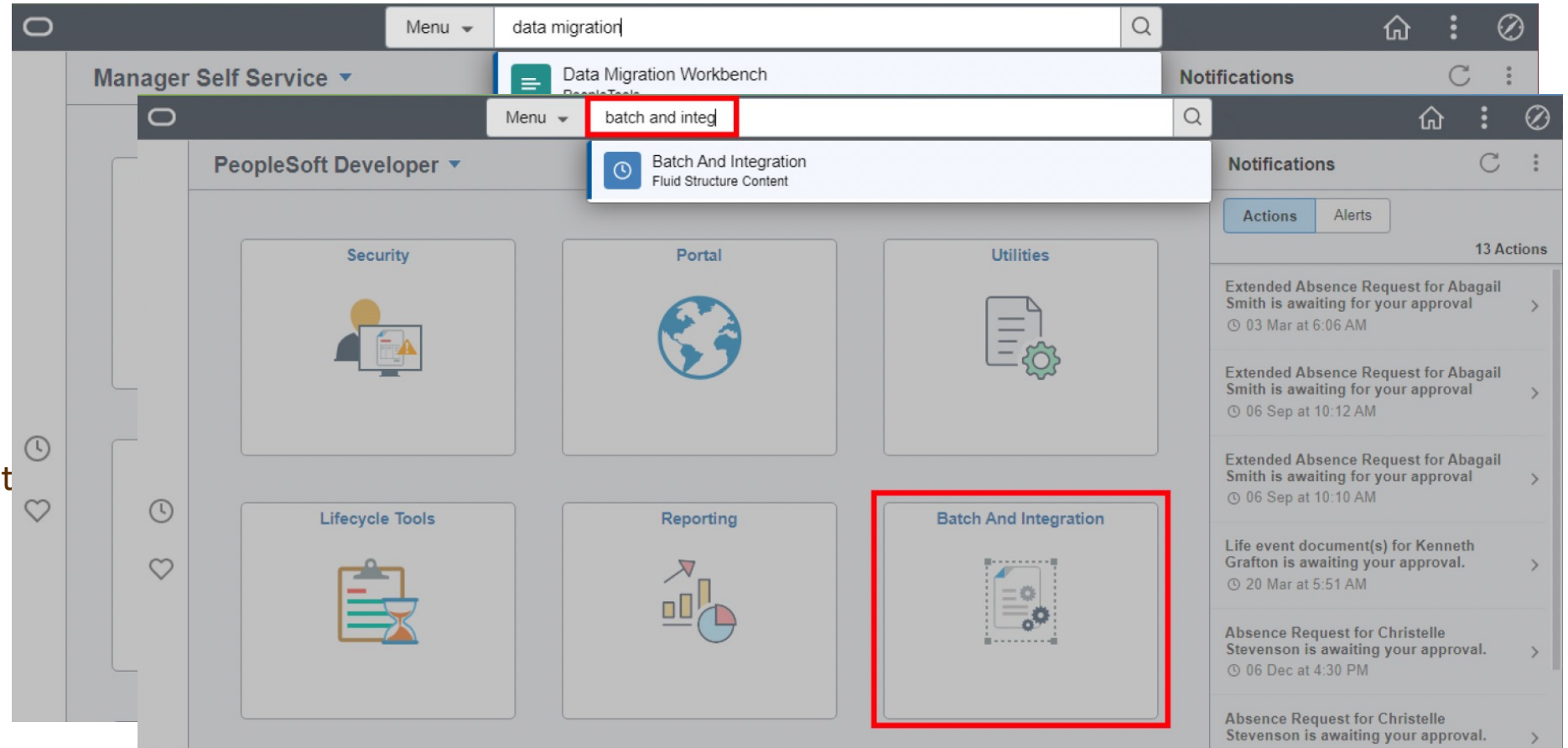
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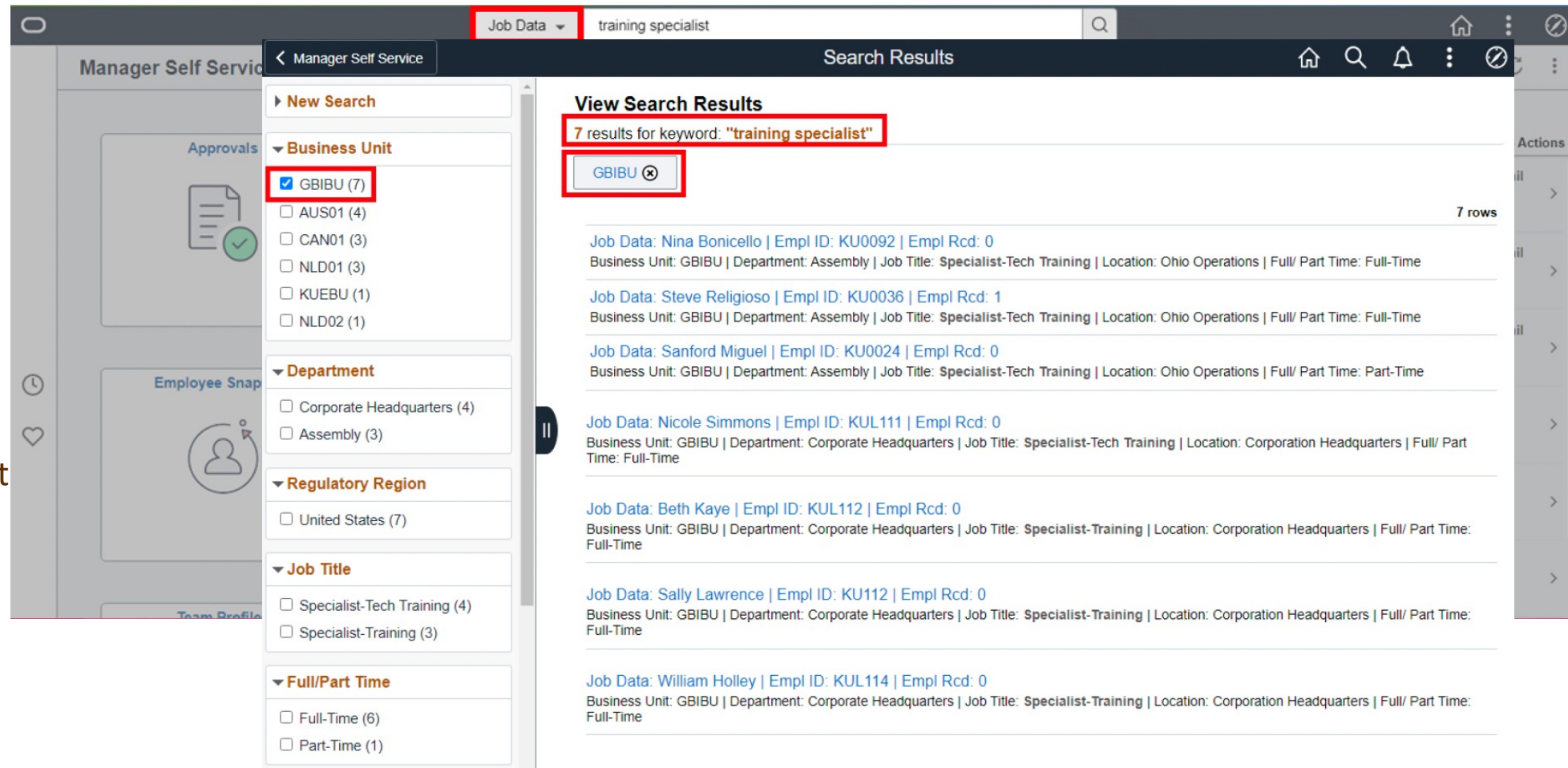
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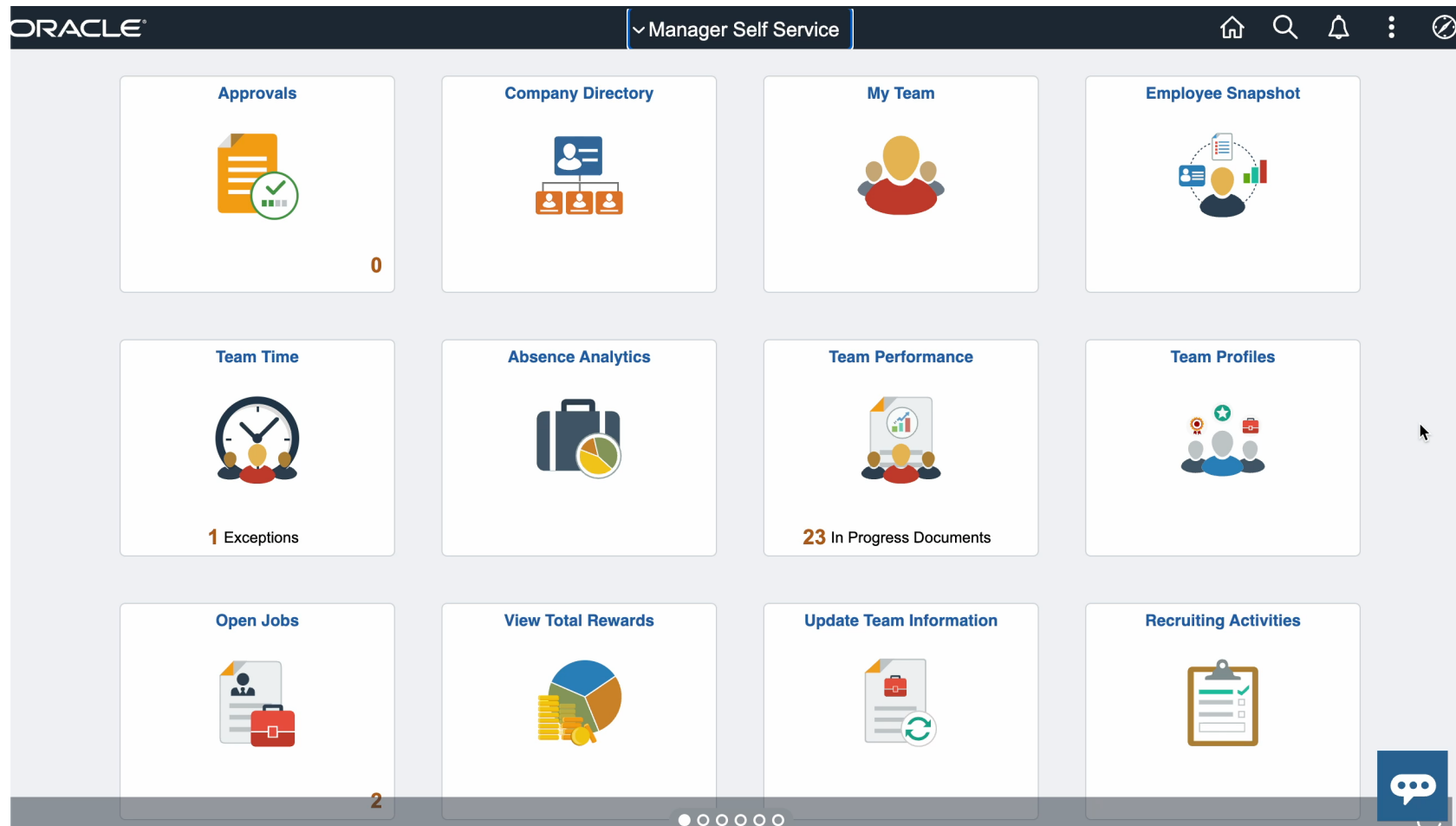
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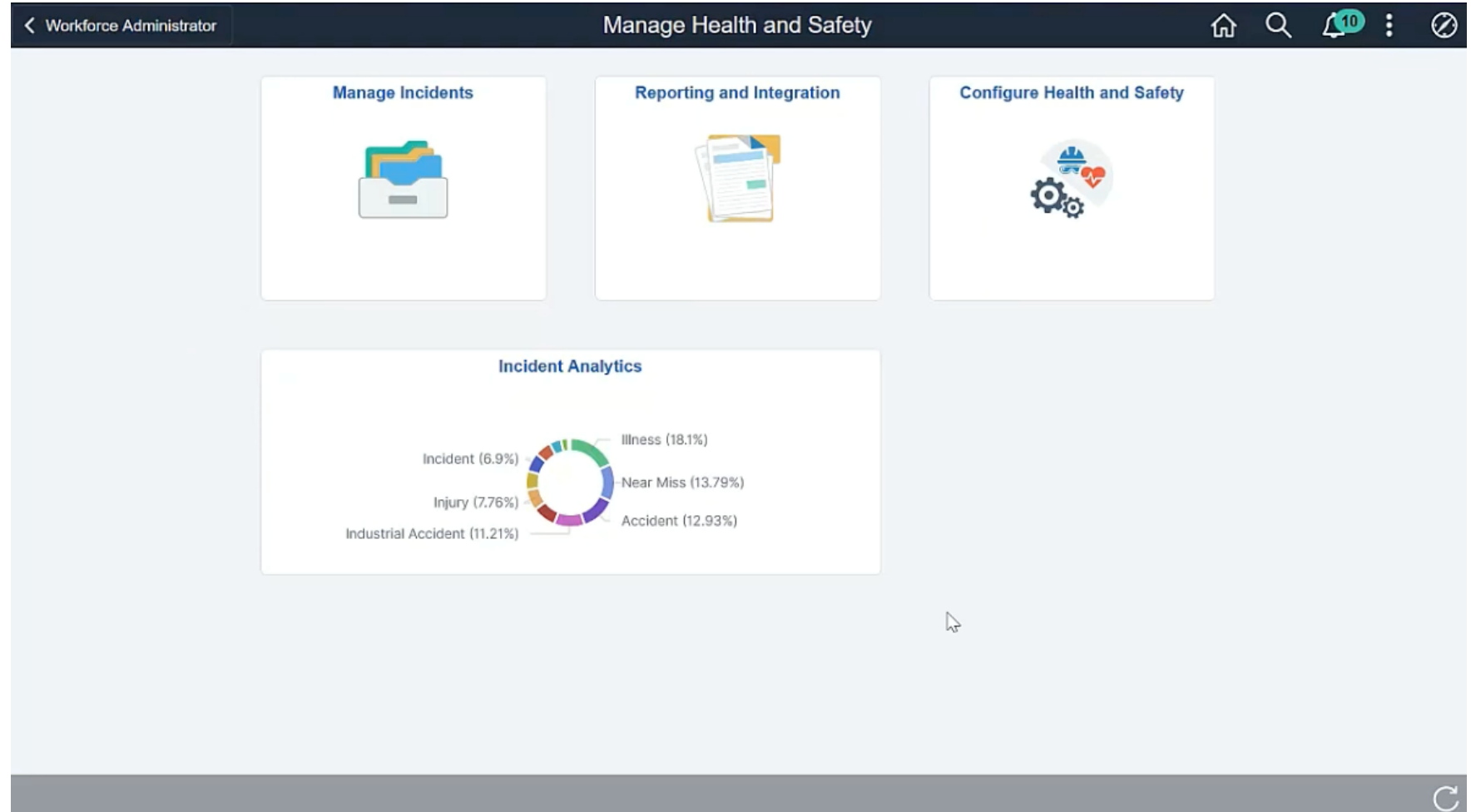
The screenshot displays two search results panels. The left panel, titled 'Menu' and 'user profiles', shows a list of menu items with red annotations: 'Suggestions from user recent' and 'Suggestions from users recent'. The right panel, titled 'Job Data' and 'training specialist', shows a list of job data entries with red annotations: 'Suggestions from current user recent keywords' and 'Suggestions from application data'. The interface includes a search bar, a navigation menu, and various data cards.

Related Actions, Related Content & Simplified Analytics

Use data and visuals in the CONTEXT of other activity



Kibana Analytics / Dashboards



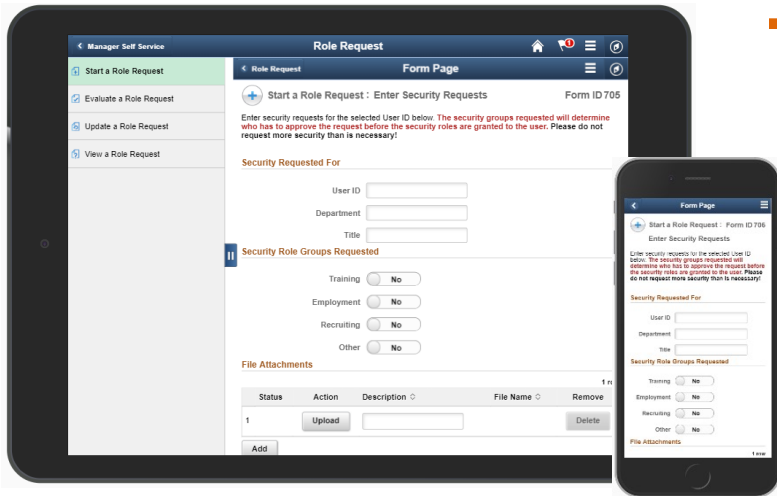
- Orig. PT8.57 for Server Metrics
- PT8.58 for App Data
 - All Search Indexes
 - Dashboards, Tiles, Related Content

Extensive Analytics features

Large Data Volumes

High Performance

GT eForms™ – Unparalleled Automation



ORACLE
Validated Integration
PeopleSoft

Deliver powerful, custom automation –
any device, anytime, anywhere

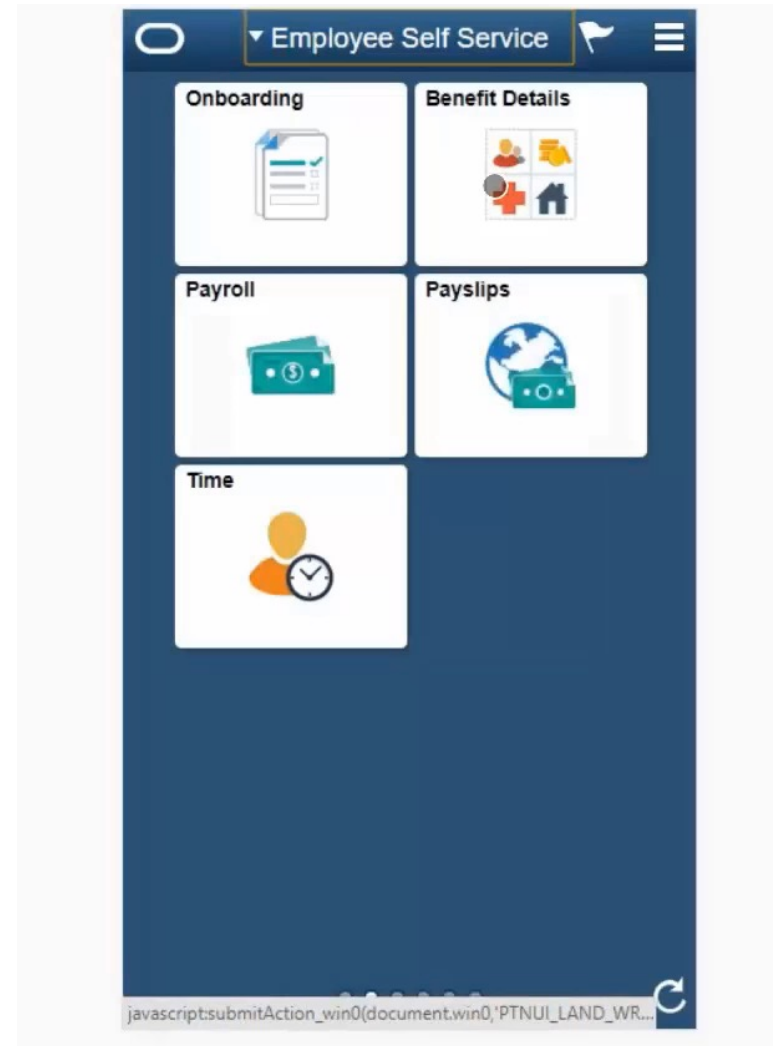
- Oracle-validated, bolt-on electronic forms framework and toolset for PeopleSoft
- Built 100% in PeopleTools – *Familiar toolset for PeopleSoft developers*
- Configuration-based form creation and management with setup tables to control business logic, form actions and routing
- Native, real-time access to PeopleSoft data, including employee, student, and financial data – *no external interfaces to maintain!*
- Leverage existing PeopleSoft workflow, security and infrastructure
- Unlimited flexibility in presentation, pageflow, workflow, and routings
- **MOBILE!** Fully Fluid-enabled to deliver dynamic eForms on any device

Quick and Easy Employee Self-Service

Example:

Veteran Status Declaration Form

- Custom Fluid eForm
- Entirely configuration – NO DEVELOPMENT REQUIRED
- 45 minutes to create



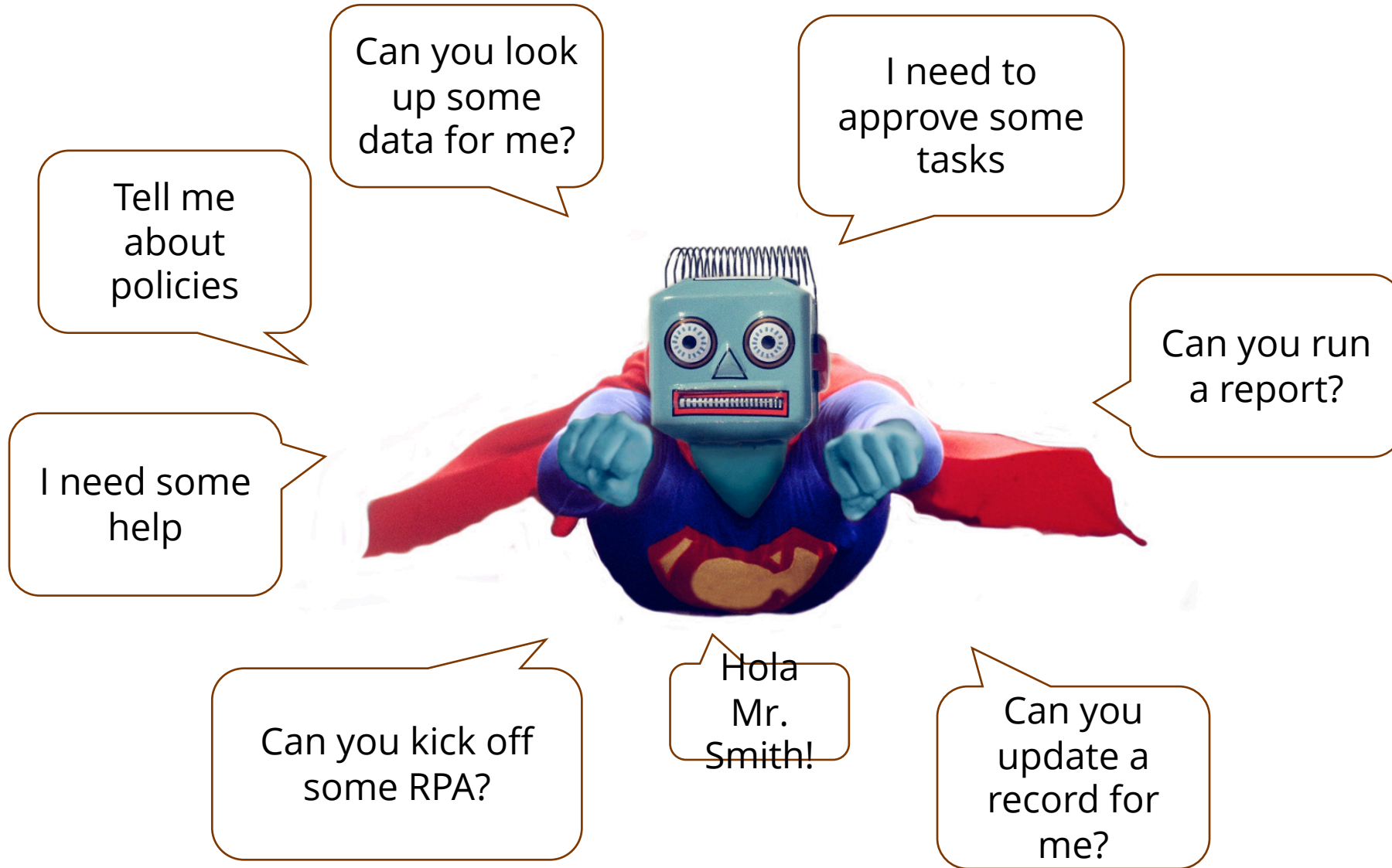
PICASO

- **Multi-skill PeopleSoft DA**
- **Web Chat UI within Fluid**
- **Pre-built data integrations to PS**
- **Running ODA**

- **Requirements:**
 - PT 8.57.07 or higher
 - ODA Subscription (starting at \$50k/yr)
 - PSFT Image Update
 - HCM 31 or higher, FSCM 33 or higher, ELM 20 or higher, CRM 18 or higher, Campus Solutions 15 or higher

Delivered & Planned
PICASO Skills

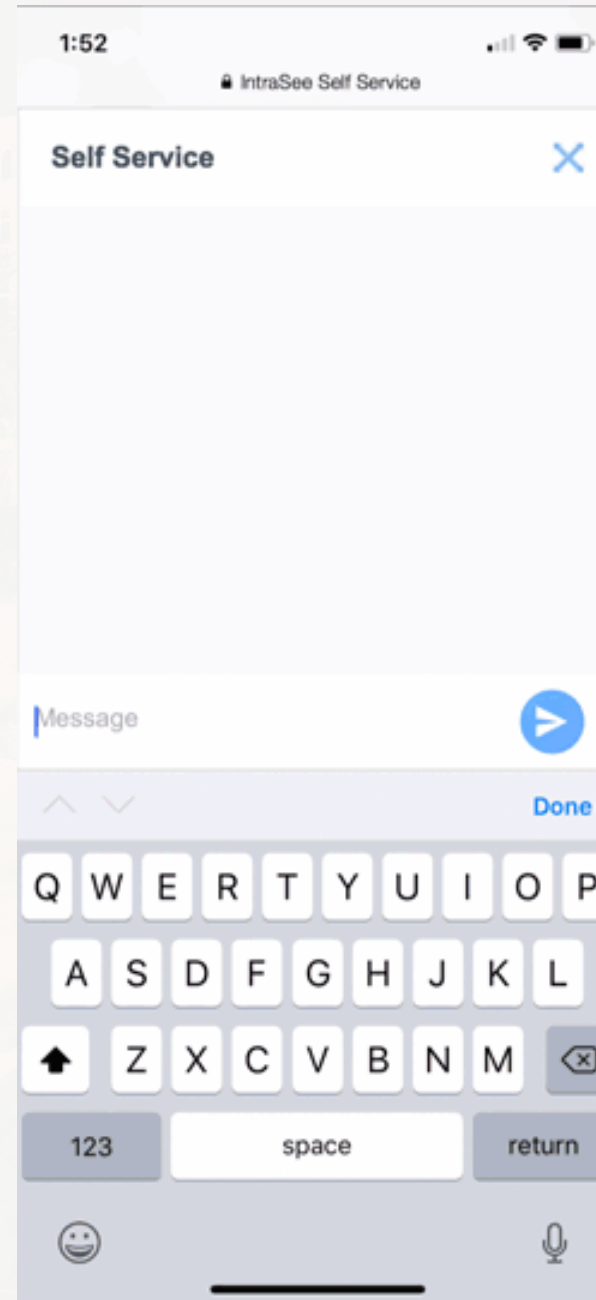
| HCM | Available Now: 2 Digital Assistants, 10 Skills |
|------------------------------------------------|---------------------------------------------------|
| Absence requests and balances | |
| Benefits plan lookup | |
| Company Directory | |
| Global Payroll payslip details | |
| Payroll for North America paycheck details | |
| Recruiting job search and application tracking | |
| Planned | |
| Employee personal details | |
| Time & Labor time inquiry | |
| Personal details | |
| Company Directory (org structure) | |
| Learning | |
| HR HelpDesk | |
| | ERP |
| | Expense report inquiry |
| | Expense report creation and update |
| | Requisition status inquiry |
| | Guest supplier inquiry |
| | Planned |
| | Accounts Receivable |
| | Bill payment |
| | Customer assistant |
| | Invoice status |
| | Manage disputes |
| | Payment status |
| | Purchase order flip |
| | Secure supplier inquiry |
| | Supplier bidding opportunities |



Meet IntraSee's IDA

Enterprise 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



Where to start?

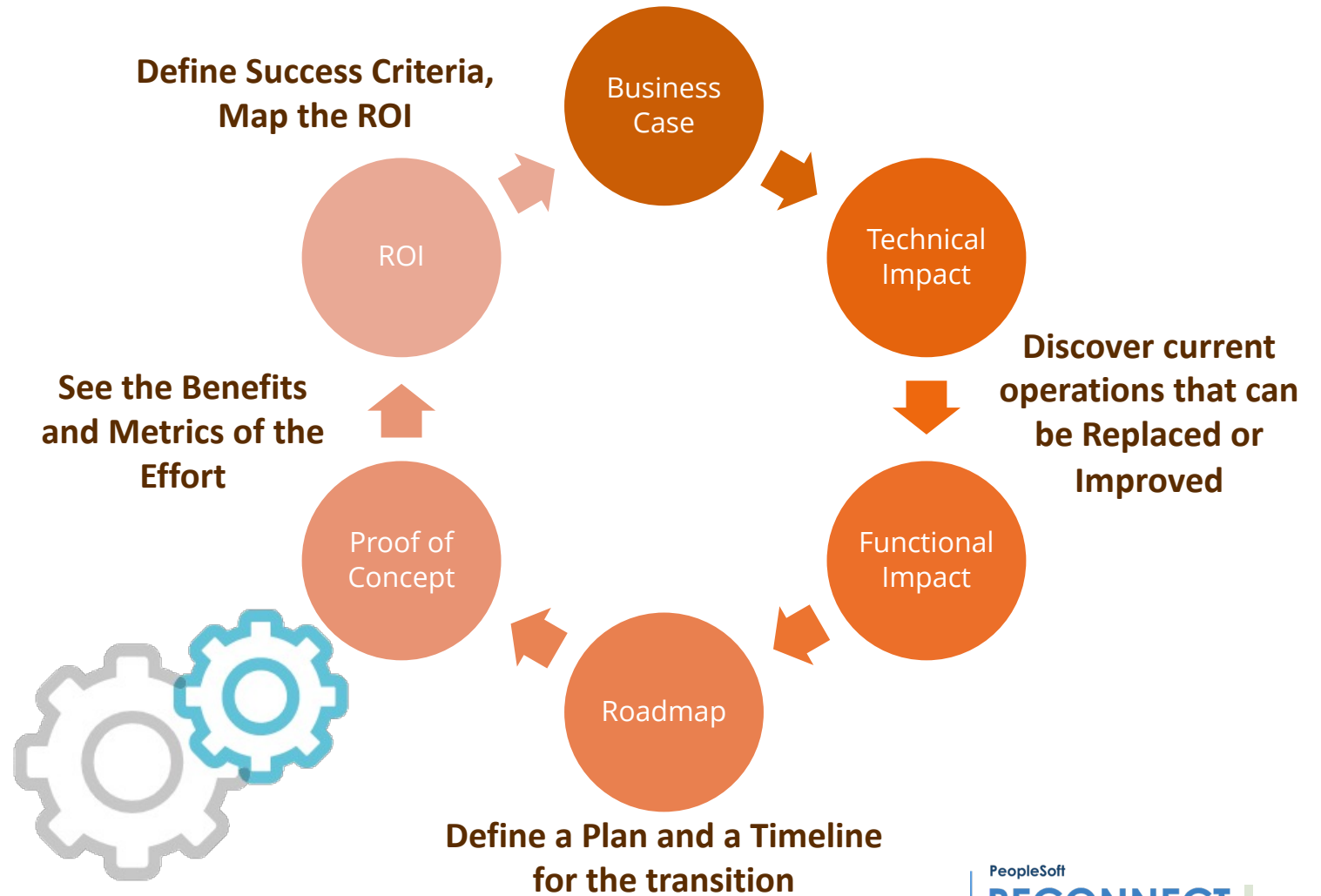
Process Optimization – Impact Assessment

Perform an Assessment so your team can understand

- Business Impact
- Cost, Value & ROI

of Process Optimization

- Review current Operational processes
- Identify opportunities for your teams to improve their metrics
- Leverage available tools, industry best practice
- Deliver Value to the Business



Gideon Taylor 2023 Blueprint 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 | Scott Crutchfield | | Learn how to quickly leverage delivered functionality to make PeopleSoft efficient, modern and more engaging for users. |
| 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. |
| 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. |
| 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? |
| Prologis is Totally Owing 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? |
| 5 Great Ways to Supercharge PeopleSoft | 103110 | May 10, 4:00PM | Scott Crutchfield | | 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! |

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

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100360



Quest
PeopleSoft
Community

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- Find answers and solve problems.
- Make better, informed decisions.
- Increase their sphere of professional influence and advance their careers.

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