



Community Insight

PeopleSoft
Edition 2021

Sharing of knowledge, experiences and expertise



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From the Desk of the CEO



Jonathan Vaughn
Chief Executive Officer
Quest Oracle Community

Hello Quest PeopleSoft Community!

One of the most impactful benefits of the Quest PeopleSoft community is the sharing of knowledge. Members of our community enjoy access to a wealth of expertise, knowledge sharing with other users, insights from solution providers and updates directly from the Oracle product teams – all in one place.

That's why we reimagined RECONNECT 2021 as a **two-part virtual conference series** - RECONNECT Envision and RECONNECT Dive Deep October 4th – 7th. Now you can connect spring and fall with PeopleSoft experts, industry innovators, technology leaders and Oracle product teams for insights, education and information.

I'm excited to bring you the fourth edition of *Community Insight*. This collection of customer success stories and articles is an excellent example of the knowledge base embodied by the Quest community.

Customer stories are so beneficial to the PeopleSoft community. They help others benchmark their own technology adoption, understand product features and benefits, prepare for new technology implementation, and formulate plans for each stage of their journey. We hope this issue will help you and your company do just that. You'll see that the articles and interviews in this issue focus on key PeopleSoft concepts: Fluid User Interface, User Experience, and Upgrades – all topics which users told us were top of mind.

While I'm confident you will learn something from reading *Community Insight*, I encourage you to share your story as well.

Please reach out to education@questoraclecommunity.org to tell us about your recent PeopleSoft implementation, project, or success – no matter how big or small!

Thanks for reading,

Jonathan Vaughn
Chief Executive Officer, Quest Oracle Community

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Quest
Oracle
Community

Serving Oracle's PeopleSoft, JD Edwards, Oracle Cloud Applications, & Database & Technology Users Worldwide

Community Insight is a catalyst to maximize members' business investments through the power of our community, tools, and experiences. We provide relevant, timely, unbiased information and create decision-making tools and networking events to help our members make informed choices – not just related to ERP applications, but to benefit the total information technology and best business practice experience.

Quest, an independent, not-for-profit association with more than 25,000 members and subscribers, focuses on PeopleSoft, JD Edwards, Cloud Applications, and Database & Technology users. Membership is open to all users worldwide.

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Meet the Quest Staff

<https://bit.ly/2EXbM9T>

Quest Board Nominations Are Open

Nominations are now open for the Quest Board of Directors (terms will begin January 2022). Our board sets Quest's strategic direction, provides fiscal oversight, ensures necessary resources, represents the members of Quest, and strengthens Quest's programs and services. It is comprised of customer volunteers who use Oracle products. This is a unique opportunity to be a leader for your user community. Self-nominations are accepted until May 28, 2021

[Meet the current board](#)



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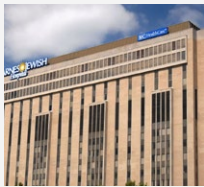
The color-coded names represent those who use **PeopleSoft**, **JD Edwards**, **Cloud**, **E-Business Suite**, or are a member of the **Quest IOUG Database & Technology Community**.



RECONNECT Envision

ALL NEW. ALL DIGITAL. ALL PEOPLESOFT.

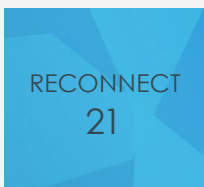
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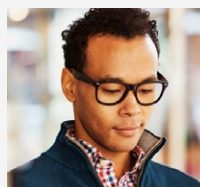
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Customer Spotlight



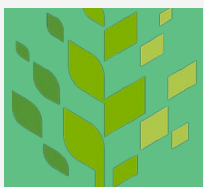
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How BJC HealthCare Improved their User Experience

Jen Matlock, ERP Analyst at BJC HealthCare, and Tanya Oliphant, ERP Consultant at BJC HealthCare, recently shared how BJC HealthCare improved user experience through simplified navigation, Pivot Grid tiles, and Fluid dashboards.



BJC HealthCare

BJC HealthCare is one of the largest nonprofit healthcare organizations in the United States. It is focused on delivering services to residents primarily in the greater St. Louis, southern Illinois, and mid-Missouri regions. BJC HealthCare is made up of 15 hospitals, 32,000 employees, 4,500 physicians, and 3,300 staffed beds.

BJC HealthCare runs on PeopleSoft HCM 9.2 Image 19, PeopleTools 8.57.05, and Oracle Database 12.1.0.2.

The Business Need

BJC HealthCare's Production Support Team navigated to dozens of PeopleSoft pages and processed dozens of hires, transfers, and additional jobs on a daily basis. The pages that they utilized were located under various menus and the delivered Manage Hires page provides limited information.

To address this need, BJC HealthCare decided to utilize delivered PeopleSoft functionality to provide an enhanced user experience and increase productivity. The goals were to optimize navigation, provide statistical information for daily operations, and produce it without technical resources.

The Approach

The first step was to identify what information was missing from the Manage Hires page that would assist with prioritizing and processing hires. They also identified data integrity issues in processing manage hires and identified the Production Support Team's most frequently used pages.

The Solution

The solution was made up of four main parts:

- **Query with drilling URL** to be used as a source for Pivot Grid
- **Pivot Grid** for manage hires process
- **Fluid Navigation Collection** of frequently used and relevant pages
- **Dashboard** to marry Pivot Grid and tiles together

Query with Drilling URL

The query used as a source for the Pivot Grid contained a Drilling URL to provide a link to the Process Hire page for completing the hire. In Reporting Tools > Query > Query Manager, at a minimum, you will need to add the HR_REQUEST record to the query and select HIRE_REQUEST_ID as a field.

On the Expressions tab, click "Add Expression." Select "Drilling URL" as the Expression Type. Click the Component URL link. Enter the component information, and then click "Search Keys." Check the flag and perform a field lookup to select the key query field that corresponds to the search field. Click "Map Columns" to select the field from the query and add the URL link. Click "OK."

The drilling URL will now be embedded in the Expression Text. Click "OK." Be sure to add any additional fields needed for the Pivot Grid and save your query.

BJC Healthcare created a custom view from HR_REQUEST to include the submitted date from HRS_RCMNT and a custom record from POSITION_DATA AND COMPANY to include the company description.

Pivot Grid Wizard and Tile

Go to Reporting Tools > Pivot Grid > Pivot Grid Wizard. Define properties and select your data source (query with drilling URL). The goal for data source information is to plot the total hire request IDs by start date. BJC Healthcare found that if you do not check "Total" for the fields not in the chart you plan to use as filters, they would be prefiltered with the first value. Checking "Total" resolved the issue.

In the View options, set the X and Y axes. In the Chart options, define the title, type, and axes labels. In the Fluid Mode options, select a grid to display below the chart. Being a large organization, BJC Healthcare typically always updates the Facet Count to "All." BJC Healthcare opted for the drilling URL on the Request ID field to open in a new window.

On the Display Page (the preview of grid in Classic mode), save and click the "Publish as Tile" link to begin the process of accessibility to others.

For the Pivot Grid Tile, fill in the required fields and add security authorization. BJC Healthcare left the remaining fields defaulted, except "Author Access," which they unchecked. After saving, users included in the security could add this tile to an existing dashboard via homepage personalization. BJC Healthcare chooses to add it to a new dashboard.

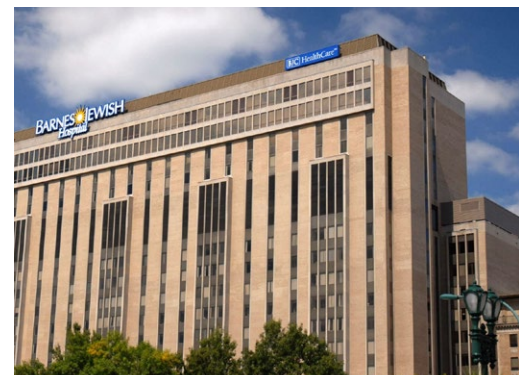
Fluid Navigation Collection

Create a navigation collection folder. This will be used to place the frequently used pages. To do so, go to PeopleTools > Portal > Structure and Content > Portal Objects > Navigations > Collections. Scroll down to "Add Folder." Enter a folder name and label. Fill out the Folder Security tab. BJC Healthcare used the same security as the Pivot Grid tile. It's important to note that the "Cascade" box is checked, so you don't need to set security for all individual links within the navigation collection. Save the navigation collection folder.

Create subfolders within the folder by going to PeopleTools > Portal > Structure and Content > Portal Objects > Navigation Collections. Click

BJC Healthcare runs on PeopleSoft HCM 9.2 Image 19, PeopleTools 8.57.05, and Oracle Database 12.1.0.2.

The goal for data source information is to plot the total hire request IDs by start date. BJC Healthcare found that if you do not check "Total" for the fields not in the chart you plan to use as filters, they would be prefiltered with the first value. Checking "Total" resolved the issue.



BJC HealthCare is made up of 15 hospitals, 32,000 employees, 4,500 physicians, and 3,300 staffed beds.



the newly created folder link and click "Add Folder." Fill out these fields for the subfolder: name, label, sequence, folder attributes (optional). Save these fields. Repeat the steps on the prior page and this page for any additional subfolders.

Create content reference links by following PeopleTools > Portal > Structure and Content > Select the navigation collection. Add the content reference link. Follow the navigation to select the page desired. Repeat the steps on this page for any additional links you desire.

Create a Fluid page for the new Production Support tile by following PeopleTools > Portal > Tile Wizard > Create a new tile. Guided process will walk you through the steps. Choose "Navigation Collection" as the data type and search for your navigation collection. Set the type to "Navigation Collection – Optimized" and decide whether the user should be able to collapse the left panel.

You can either accept the default name or name it according to your naming conventions. The parent folder determines where the page will reside in Portal Registry. Set security. For BJC Healthcare, the security matches the Pivot Grid and navigation collection.

Set an image for the tile. BJC Healthcare used only delivered images, which you can browse by following PeopleTools > Portal > Portal Utilities > Navigation Collections. Click "Add Collection" and expand "Override Default Options" and click to search the collection image. Update the search to "Contains FL" and search to limit to mostly Fluid images. Tip: Sort by size. Large images are suitable for tiles, and medium or small images are suitable for navigation collection links. Not all Fluid images contain "FL," so this is not fool-proof, but it gets you a lot to choose

from. Record the image names that you want and then cancel creation of the navigation collection.

The Tile Repository determines where users will see the tile if they personalize these areas. Review the settings and click "Publish."

Fluid Dashboard

Create a dashboard at PeopleTools > Portal > Dashboard > Manage Dashboard Pages > Fluid Dashboards > Create New Dashboard Page. BJC Healthcare continued with the related "Production Support" label names and the same parent folder and security roles as the Pivot Grid and navigation collection tiles. Click "Save."

Add tiles to the Fluid Dashboard by following PeopleTools > Portal > Structure and Content > Fluid Structure Content > Fluid Homepages. Then, click "Edit" next to the dashboard. Select the tiles you want to include in the dashboard. The box that your tile is in will match the parent folder that you selected in the Pivot Grid Wizard/Tile Wizard. Click "Save." BJC Healthcare's Production Support dashboard houses a Production Support tile that contains all of the navigation collection. The Manage Hires tile contains the Pivot Grid.

Conclusion

BJC HealthCare was able to centralize navigation and provide statistical information and quick links to daily operations using delivered functionality through configuration. To learn more, check out the [RECONNECT 20 presentation](#) where the pair discussed in detail how they did it.

PeopleSoft

RECONNECT

ENVISION

Key Sessions to Attend at RECONNECT Envision

This list gives a brief overview of some of the key sessions available at RECONNECT Envision. Check out the [full agenda](#) for an in-depth look at what else is going on throughout the week!

Monday, April 26

101010: PeopleSoft Investment Strategy & Roadmap

Presented by Paco Aubrejuan, Oracle

101020: PeopleSoft ERP Today & Tomorrow – Innovation Drives Visibility and Collaboration

Presented by Amira Morcos & Madhavi Makkapati, Oracle

101340: PeopleSoft HCM Overall Update and Roadmap

Presented by Robbin Velayedam, Oracle

101300: PeopleSoft PeopleTools Roadmap

Presented by David Bain, Oracle

100250: PeopleSoft Financials PUG Meeting

Presented by Jennifer Bentley, Lockton
Alicia Kinsey, KAR Auction Services, Inc.
Pamela Ingram, Hennepin County
Angela Osterman, Frankenmuth Mutual Insurance Company

100170: PeopleSoft Technology SIG Meeting

Presented by Victor Frank, Jack Henry & Associates
Michelle Erkenswick, Jack Henry & Associates
Sasank Vemana, Florida State University
Mike Rader, Raytheon Systems Company
Mark Hoernemann, Oracle
Jeremy Irrthum, University of Minnesota

100350: PeopleSoft Benefits SIG

Presented by Loreen Inghram, Westfield Group, Inc.

101500: Public Sector User Group Meeting

Presented by Tracy Sewell, County of Ventura, California
Corey Kaufman, State of Montana

Tuesday, April 27

101690: Roadmap to Modernization: Achieving PeopleSoft Objectives for 2021 & Beyond



Presented by Greg Wendt & Scott Hirni, AppSIAN

101160: Important Improvements in the Fluid User Interface

Presented by Arokiarajasek Arokiadoss & Mark Hoernemann, Oracle

100140: Fluid Open Enrollment and Best Use of Delivered Tools

Presented by Arkalgud Venkatesh, Alameda County

101360: PeopleSoft Human Resource Update and Roadmap for Administrators

Presented by Julie Alonso, Oracle

101220: Harden PeopleSoft in the Cloud

Presented by Greg Kelly, Oracle

101540: UC Berkeley reduces PUM & Tools Upgrade Time and Cost using PeopleSoft Test Framework

Presented by Supriya Prabhakara, Astute Business Solutions
Gopi Margam, University of California, Berkeley

April 26 - April 29, 2021

Plan for the future.
Roadmaps, updates, enhancements & cloud.

Wednesday, April 28

101620: PeopleSoft ePerformance Demonstration

Presented by Charles Stegeman & John Kovac, Aspire Consulting



101630: Save Costs for Oracle Training & Documentation – Your UPK Alternative

Presented by Tobias Mrozek & Cynthia Stahlhut, datango



101770: Accounts Payable Automation: Real Time is Now

Presented by Mark Brousseau & Bruno Vande Vyvre, Canon Information & Imaging Solutions, Inc.



101280: Today's Cloud Manager: What Can It Do For You?

Presented by Mark Hoernemann & Biju Narayanan, Oracle

101570: AP Dashboard - Can Your AP Staff Really Work From Home?

Presented by Matthew Frigo & Alicia Kinsey, KAR Auction Services, Inc.

100040: HR Notifications: The Easiest Thing You'll Do All Day!

Presented by Nicole Apostola, University of Massachusetts President's Office

100160: Upgrade Your Image (Continuously Improve your PUM Image Application Process)

Presented by Jeremy Irrthum, University of Minnesota

101200: PeopleSoft Analytics Roadmap

Presented by Jody Schnell & Matthew Haavisto, Oracle

101140: Eliminate Customizations with the Page and Field Configurator

Presented by Kelly Mills & Joe Willever, Oracle

Thursday, April 29

101000: PeopleSoft Investment Strategy & Roadmap – An Interactive Discussion

Presented by Rebekah Jackson, Oracle

100300: Life Hacks for PeopleSoft

Presented by Sasank Vemana, Florida State University

101330: Kibana Palooza

Presented by Matthew Haavisto, Tulip Antar, Shamzeer Nambiyath, Bob Block, Joe Willever, Jian Wen, Madhavi Makkapati, Robbin Velayedam, David Bain, Oracle

Burning Questions for PeopleSoft

Presented by Rebekah Jackson, Alex Man, Willie Suh, Char Jorgenson, Robbin Velayedam, & David Bain, Oracle

101250: Oracle Cloud Infrastructure: The Premier Cloud for PeopleSoft

Presented by Craig Mikus, Oracle

101270: PeopleTools Product Panel Discussion

Presented by David Bain, Greg Kelly, Matthew Haavisto, & Mark Hoernemann, Oracle

100660: KP's Experience Implementing Oracle Guided Learning on ERP

Presented by Allyson Brown & Charlie Lara, Kaiser Permanente

100210: Regional Medical Center – Updating your PUM and Adding New Features During a Pandemic

Presented by Sheila Tyson, Regional Medical Ctr. of Orangburg

How City of Raleigh Implemented Fluid UI and ePerformance Concurrently

City of Raleigh's Human Resources Department recently implemented Fluid User Interface and ePerformance to help them:

- Replace PeopleSoft Portal (Interaction Hub)
- Make PeopleSoft HCM the gateway (homepage) for users
- Create separate homepages based on users' roles
- Transform paper performance evaluation forms
- Manage the performance management cycle
- Manage the annual evaluation and approval process
- Integrate with eCompensation Manager Desktop

ePerformance Project Overview

City of Raleigh wanted to transform its three paper performance evaluation forms into Performance Document Templates in ePerformance:

1. General Employees
2. Supervisor/Technical Employees
3. Executive Employees

ePerformance was also used to manage the Performance Management Cycle that ran from July 1st to June 30th. From July to August, the focus was on goal



The City of Raleigh organization is made up of 20+ departments that serve over 470,000 citizens. There are 4,000 full-time employees and over 3,000 part-time employees.

City of Raleigh runs:

- PeopleSoft HCM 9.2 PUM Image 20
- PeopleSoft FSCM 9.2 PUM Image 29
- PeopleTools 8.56
- Several interfaces with both internal and external systems

Within HCM, City of Raleigh runs Core HR, Position Management, Benefits, Compensation, ePerformance, Payroll, Time and Labor, Absence Management, and ESS/MSS.

For FSCM, City of Raleigh utilizes General Ledger, Accounts Payable, Expenses, Inventory, Asset Management, Commitment Control, Purchasing, Procurement, Supplier Contract, and ESS/MSS.

Other Oracle products at City of Raleigh include Budget Management System (Hyperion) and iLearn (Taleo Learn).



City of Raleigh wanted to replace PeopleSoft Portal (Interaction Hub) with Fluid, make PeopleSoft HCM the gateway (homepage) for users, and create separate homepages based on users' roles.



development. The mid-year review happened from January to February, and the year-end evaluation was from July to August.

City of Raleigh's annual evaluation and approval process consisted of the following steps:

- Supervisor submits employee's performance document to reviewer
- Reviewer approves and adds comments
- Supervisor shares with employee

Planning for the ePerformance project started in October 2018 and ran through May 2019. Design began over the next few months, and the build was complete by Fall 2019. After testing, City of Raleigh deployed ePerformance in January 2020. Training swiftly began in February 2020, and post-production support began after that.

Fluid UI Project Overview

City of Raleigh wanted to replace PeopleSoft Portal (Interaction Hub) with Fluid, make PeopleSoft HCM the gateway (homepage) for users, and create separate homepages based on users' roles.

User roles:

- **HCM**
 - HR Administrator
 - Benefits Administrator
 - Compensation Administrator
 - Safety & Health, Worker's Comp
 - Payroll Tasks
- **FSCM**
 - Accounts Payable
 - Asset Management
 - Buyer Homepage
 - General Ledger
 - Inventory
 - Requester

Customer Spotlight: City of Raleigh



Planning began in March 2019 and ran through early Summer 2019. Design and build were complete by November 2019, and testing was complete by January 2020. After training, deployment and post-production support ran through February and March 2020.

Challenges Faced

City of Raleigh identified several issues throughout their Fluid and ePerformance implementations:

- **Resource Management**
 - o Resource constraint: The same functional resource was heavily involved with both projects
 - o Lack of resource: Both projects had to be on hold for a while as there were several vacant positions
- **Timeline**
 - o Both projects were overwrapped
- **Documentation**
 - o Business/Functional Requirement Document for ePerformance Project was not created at the beginning of the project
 - o There was not a standard to review the deliverables
- **Stakeholders' Involvement**
 - o Only limited stakeholders were involved with requirements gathering and design
- **Training**
 - o Some confusions were caused as PeopleSoft terminology is different from the City's terminology
 - o Employee skill level and computer literacy varies
 - o Some of the training materials for ePerformance needed to be recreated after Fluid UI was implemented
- **Change/Enhancement Requests**
 - o Change and enhancement requests continued to be identified during and after the Production Support phase

Tips & Tricks

To help resolve some of the issues identified above, the City of Raleigh put together recommendations for others:

- **Resource Management**
 - o Allocate enough resources before starting a project
- **Timeline**
 - o Manage multiple projects properly that have impacts to other project(s)
- **Documentation**
 - o Identify deliverables at the beginning of the project and create standards of the documentation and QA process for the deliverables
- **Stakeholders' Involvement**
 - o Involve stakeholders from different departments with the requirements gathering for any new functionality that has major impacts to end users
- **Training**
 - o Create training materials to meet employee's skill level
 - o Involve training managers from the planning phase of a project to create appropriate training plans and materials, especially if a project has impact to other project(s)
- **Change/Enhancement Requests**
 - o Involve stakeholders from different departments with the requirements gathering for any new functionality that has major impacts to end users



To learn more, check out the [City of Raleigh's presentation](#) from RECONNECT 20.

Remote Updates During COVID-19

In 2020, many businesses were forced to take on remote work during the COVID-19 pandemic. Remote work was a new world for many, and to no surprise, brought on several challenges. Jack Wood and Dennis McCormick, two City & County of San Francisco, CA **Controller's Office** employees, were joined by Doris Wong, CEO of CCSF's implementation partner **Smart ERP Solutions**, to share what it takes to implement a PeopleTools upgrade and HCM/ELM catchup, all remotely during COVID-19.



City & County of San Francisco is the only combined city and county in California. There are approximately 36,000 employees across 55 departments and 35 labor unions that serve CCSF. There are 15,000 suppliers and 500,000+ payments annually. For reference, CCSF's budget was \$11 billion in the 2018-2019 fiscal year.

CCSF's enterprise applications consists of the following modules (which have been internally branded):

- PeopleSoft Interaction Hub (iHub) – Branded "SF Employee Portal"
- PeopleSoft Human Capital Management (HCM) – Branded "SF People & Pay"
- PeopleSoft Enterprise Learning Management (ELM) – Branded "SF Learning"
- PeopleSoft Financials & Supply Chain Management (FSCM) – Branded "SF Financials" and "SF Procurement"
- Cognos Budget & Performance Management System (BPMS) – Branded "SF Budget"
- Oracle Business Intelligence Enterprise Edition (OBIEE) – Branded "SF Reports & Analytics"

Additional applications include Cognos Business Intelligence, Cognos Informatica, Oracle Identity & Access Management (IAM/IDCS), TimeLink, Control-M, Phire Architect, DataGuard, and GoldenGate.

CCSF's Vision & Strategy for PeopleSoft

The mission of CCSF's Controller's Office is to ensure the City & County's financial integrity and promote an efficient, effective, and accountable government. The Controller's Office has several strategic goals, including:

- Promote best practices and accountability in City government
- Support informed policy decisions
- Safeguard the City's long-term financial health
- Provide high-quality financial services
- Support the City's financial systems and infrastructure
- Sustain the City's financial operations in a disaster
- Increase public access to useful and timely information
- Invest in and value its employees
- Manage the Controller's Office effectively

Within the Controller's Office, there are eight divisions, one of which is the Systems Division. This division focuses on the Controller's Office's IT systems, including PeopleSoft. The focus over the last few years has been staying current and efficient with Images, PeopleTools, and releases. This focus is so vital, that CCSF did an exercise that help embed it into its core values and mission:

- **Where We Want to Go:** We envision being a premier IT organization and trusted partner within the City, as well as a [national leader in enterprise systems implementation and support](#).

Customer Spotlight: City & County of San Francisco

We envision being a premier IT organization and trusted partner within the City, as well as a national leader in enterprise systems implementation and support.

- **Purpose:** Continuous improvement within our people and with our business solutions; consistently pursuing best practices and innovative technologies; *be efficient in staying current with application and security updates*; provide work that has diversity for those looking for new challenges, consistency for those looking for balance, and opportunities for those looking to grow.
- **Operating Principles:** Value and recognize the good work of others; prepare for and run effective meetings; lean in and contribute to conversations; *delivered or configurable solutions first and customize only when necessary*; communicate to manage expectations of customers, peers, and supervisors; assume positive intent; have fun and make it a better place to work.
- **Harmonizing Values: Collaboration;** happy staff; reliability; *operational excellence*; outstanding customer service; ownership; openness.

CCSF's Get Current Strategy

CCSF's Controller has had a vision laid out over the last 10 years that included updating all of the city's backend systems. CCSF started in 2012 when they went live on its HCM system and retired mainframe legacy systems. They also rolled out ELM, Portal, and iHub during that period and opened up to all of the 30,000 users. The major update was replacing the FAMIS mainframe system in 2017 that had been in place for 20+ years. It was replaced with PeopleSoft FSCM and OBIEE. CCSF is also in the progress of replacing a legacy Budget system.

As of 2018, CCSF had only undergone one major upgrade project. In 2019, the team took a look at what the vision needed to be moving forward and decided to emphasize the importance of staying current. The decision was made to do one update per year on each system, which started in 2019 on the Financials side. In November 2020, CCSF upgraded to FSCM Image 35, and was able to greatly improve their process. You can see the comparison in the following chart below.

Comparing FSCM 2019 to 2020

	2019	2020
Schedule	10 months	5 months
Budget	\$1.5M	\$230K
Resources	SmartERP PM, Func & Tech	SmartERP Tech Only
Scope	12 Images & 2 PeopleTools	5 Images & 1 PeopleTools
Quality	Very Good	Even Better!

CCSF did the hard work to retire legacy systems, so now staying on the Continuous Release model will help them stay on the path toward avoiding outdated systems. CCSF credited much of their success to implementation partner, Smart ERP Solutions, who runs the core upgrade for CCSF. The CCSF team feels that outsourcing is the right model to help them to upgrades faster, cheaper, and easier for all.

COVID-Delayed HCM/ELM Release

CCSF's plans for a March 2020 go-live for HCM and ELM were put on hold when COVID-19 hit, but the team was able to bounce back quickly and reschedule the go-live for late April 2020. Reasons for the delay included:

- San Francisco's mandatory shelter-in-place was implemented on March 17, 2020.
- Staff had to adjust to working from home (dealing with VPN, moving equipment, etc.)
- CCSF is a Public Sector organization, so there was an influx in new work to help support the City's COVID response. The staff was working full time at the Emergency Operations Center and on building new systems tools.
- Uncertainty!

Some of the factors that drove the selection of the new date were:

- Aggressive Approach
 - Minimize throw away work as CCSF introduces new code to Production
 - Needed to do another MTP pass – more time/ money
 - If not April, it would delay other projects. Then, go-live couldn't be until November at the earliest (more likely March 2021). Not ideal!
- Conservative Approach
 - Given everything CCSF needed to do to support employees and the community, why take the risk of something going wrong?

While there were undeniably risks of doing a major Image catchup (Image 13 to Image 32 catch up) during COVID with so much else happening, the CCSF team ultimately decided that it was worth the risk to get this project done sooner than later. The real challenge came from doing the work remotely while handling the HCM upgrade (Image 13 to Image 32), a big PeopleTools jump (8.54 to 8.57), a highly-customized HCM system (90 retrofits/new), an ELM upgrade (Image 13 to Image 19), new tiles/links/slide outs for iHub, and new Expense functionality for FSCM concurrently.

When planning the downtime scenarios, CCSF's best case was estimated at 56 hours (noon on Friday to 8:00 pm on Sunday). The worst case was 72 hours (noon on Friday to noon on Monday). The team was very close to the best-case scenario in real life, taking 59 hours to complete (noon on Friday to 11:00 pm on Sunday).

The remote project team was made up of three Smart ERP upgrade specialists, a project manager, a CTO, a project director, five PeopleSoft Administrators, four developers, 20 functional team members, four DBAs, three Server Administrators, two people working on network, and three people working on IAM/security. While the team faced minor local internet and DRP issues, overall, the go-live was a success.

What Was Done Differently Due to COVID

Due to the project being done remotely, CCSF had to approach it differently, which included:

- A fully remote upgrade
- More contingency planning than normal due to uncertainty
- Heavy reliance on collaborative tools like Smartsheet and Teams

- More QA in advance. Really tried to not use delay to introduce scope focused on QA testing.
- More extensive and organized smoke testing scheduled

Results of the Remote Upgrade

For the end users:

- Escalation calls were scheduled for the entire week, but were cancelled on the second day
- All critical issues were resolved by Tuesday (implementation finished late Sunday before)

For the CCSF team:

- Harder to due the number of communication channels and sidebar conversations in real-time
- Lost local internet access at the command center
- Encountered some last-minute challenges and had a communication lag that created stress

Despite challenges, the team was able to pull it off!

Lessons Learned

CCSF shared some of the lessons learned from this remote upgrade project:

- Remote upgrades are possible and may be the "new normal." Start planning for them now!
- Know the tools you are going to use in advance. Don't introduce new things that weekend!
- The core project team will be overwhelmed with update requests. Staff (or even overstaff) the communications function.
- Remote locations introduce more complexity and uncertainty. Try to mimic go-live during your dry run or tabletop exercises to test tools and access.
- Get alignment from your executives to ensure full buy-in on why you are doing it in advance. Be clear about the risks and benefits.
- Test more. QA prior to go-live and have more extensive smoke testing.

To learn more about CCSF's remote upgrades and Continuous Release plan, check out the original presentation [here](#).

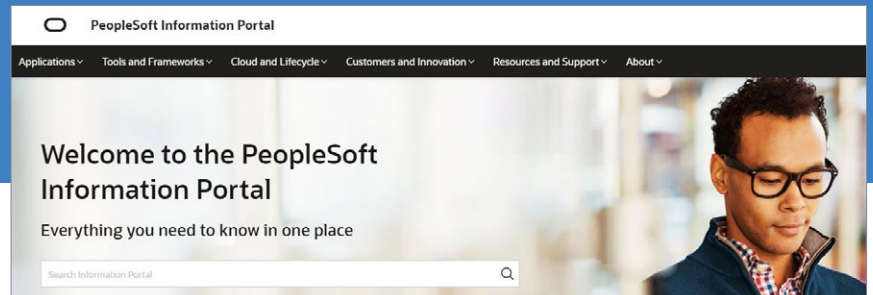
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There are many great resources out there for the PeopleSoft user community. Between PeopleSoft Information Development, the PeopleSoft organization, and Quest Oracle Community, our partnership provides quality information solutions to help you and your employees succeed. To help manage your business and maximize the value of your software investment, below are a list of resources we feel are important for any PeopleSoft user to know about.



Oracle PeopleSoft Resources

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PeopleSoft YouTube Channel

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This is the home page for all PeopleSoft Update Manager content, information, and Update Image files.

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functionality to create highly usable, efficient, and productive experiences for Oracle customers.

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This blog provides information about legislative updates to PeopleSoft Applications.

PeopleSoft Technology Blog

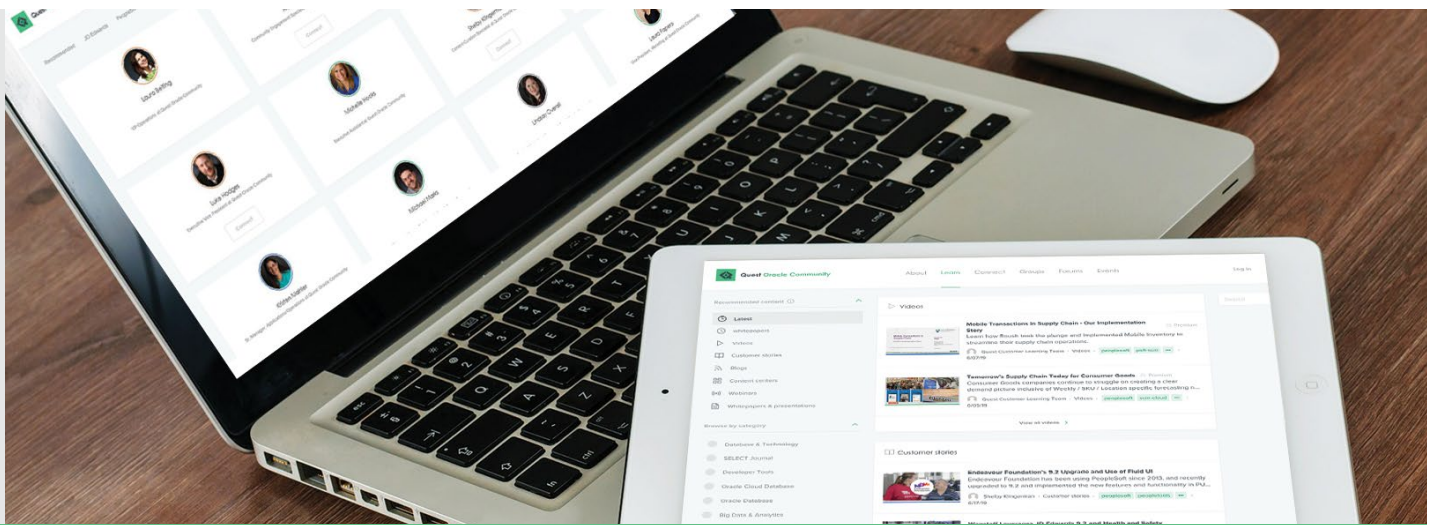
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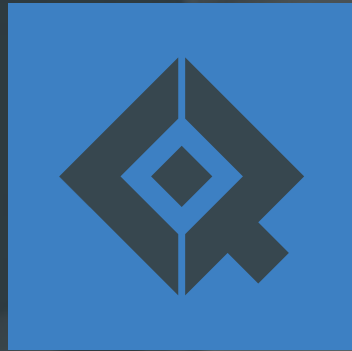
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Exclusively for PeopleSoft users, RECONNECT has been reimagined for 2021 as a two-part virtual conference series (RECONNECT Envision and RECONNECT Dive Deep) that connects hundreds of IT leaders and business users to PeopleSoft experts, industry innovators, technology leaders and Oracle product teams for insights, education, and information. Don't miss RECONNECT Dive Deep on October 4-7, 2021!



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