



PeopleSoft Innovators

Insights & Survey Report (2017 – 2020)

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Executive summary

Oracle introduced the PeopleSoft Innovators program in 2017. In the last three years, the program has gathered a significant amount of information on what customers are doing with their PeopleSoft implementations. The PeopleSoft team conducted a detailed analysis on this data, identifying trends and insights along each of PeopleSoft's key investment themes. That data is summarized here, along with findings from a survey Oracle conducted with the PeopleSoft Innovators at the end of 2020. The purpose of this report is to summarize this information and make it easily accessible to the entire PeopleSoft community, so other customers can apply that insight to their own PeopleSoft implementations.

Key Innovator insights and survey findings:

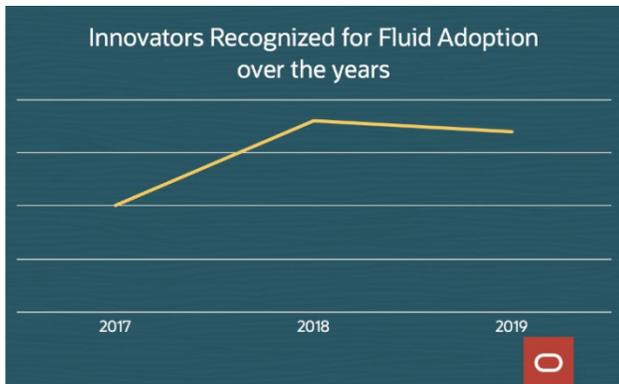
- 80 Innovators from various industries and geographies have been recognized since 2017.
- More than 62% of PeopleSoft Innovators have deployed the Fluid User Interface, making it the most popular category in the Innovators program.
- 40% of the innovators have stated that they use Selective Adoption to stay current with the new features as they are released.
- 47% of the Innovators who have adopted Cloud say that the adoption of Oracle Cloud Infrastructure identified specific cost savings and decreases in the total cost of ownership.
- 88% of the Innovators recognized for running PeopleSoft in Oracle Cloud Infrastructure are running their Production instance in OCI.
- Nearly all of the Innovators survey respondents found Fluid helpful in responding to the pandemic.
- When asked what they are planning to do during the next 6-12 months, most customers have a robust list of plans.
 - “Implement Kibana, PeopleTools 8.58 Upgrades and ‘Get Current’ on Application Images”
 - “Deploy new features - Job Data Modernization, Fluid Open Enrollment, etc.”
 - “Deploy new products - Time & Labor, Program Management, Expenses”
- All Innovator survey respondents said they would prioritize de-customizing amidst the pandemic, if they had not already done so.

Fluid UI

Innovator insights

There are 50 Innovators recognized for their Fluid deployment. The most commonly utilized Fluid components or features are:

- Fluid Navigation
- Tiles
- Home Page
- Employee Self Service
- Fluid Approvals
- Manager Self Service
- Candidate Gateway
- WorkCenters
- Pivot Grids
- Dashboards



Survey insights

Most useful capabilities

The following were the most useful Fluid capabilities in responding to the pandemic, as identified by the Innovator survey respondents:

- **Announcements tile** to communicate with staff
- **Dynamic tiles** for displaying balances, saving time (clicks), and driving compliance (exceptions turn red)
- **Approvals**, which the executive team appreciates for the ease of processing
- **Custom tiles** for things like compulsory training

- **Expenses** to submit from anywhere and track and report on COVID-19 related items

Most significant impacts

Nearly all the respondents found Fluid helpful in responding to the pandemic. Through fluid they were able to:

- Increase **remote workers and mobility**
 - Easier data entry, system access
 - Nonstandard work hours
 - Mobile devices, laptops
 - Greater flexibility and control of activities
- Respond to **unexpected requirements**
 - Confirm updated addresses
 - Drop classes late (Forms)
 - Activity Guides for students is “priceless”
 - New reports to manage vacation time
- **Eliminate paper forms** (and associated backlog)
 - Track remote workers in HR
 - Health and Safety incidents

Here are some customer quotes:

- “With the majority of users remote, there are **many more devices** in use with **multiple form factors** being utilized for which FLUID is optimized.”
- “Updating an address with the Fluid interface is clear and straightforward, but **in Classic it would have been pinch and zoom** and far fewer students would have completed the update.”
- “We have thrown a huge amount of information at students/employees with/about COVID. By showing them their to-do items and walking them thru the processes **via the activity guides, we have made the steps extremely easy** for them to complete and understand.”
- “We had also experienced a lot of disruption in the past with earthquakes, floods, snow preventing access to campus and Version 9.1

did not make remote working as easy during those events. **We were well positioned in the pandemic.**”

- “If we did not have Employee Self Service implemented prior to the pandemic, **we would have had a backlog of paper forms** to process.”
- “Griffith University deployed a tailored Fluid WorkCenter for HR administrators and HCM Guided Self Service for managers and employees, resulting in operational savings of AUD \$350,000 annually.”

Additional comments

Those that said Fluid had little impact on their pandemic response widely acknowledge it as superior.

Here are some customer quotes:

- “Roll-out of the fluid interface, guided navigation, tiles, and fluid dashboards **transformed our user communities** and streamlined our organization initiatives. Fluid technologies helps to **ease customer change, fatigue and reduced our overall end-user pieces of training.**”
- “It wasn’t too difficult for IT since we are used to working remotely before though not 100%. ... **Fluid UX is just a better UX and much more user friendly on mobile devices.**”
- “We had a **robust remote work policy even before the pandemic.** Hence the transitioning of the work location from office to home during pandemic was quite seamless.”
- “Our entire PeopleSoft platform is accessible from anywhere, as long as they are connected to our secure County network. Employees access the system via web VPN to services such as Time entry, their paycheck, voucher approvals, EZ Sourcing, etc. **Fluid has made the system versatile and very user friendly.**”
- “Our introduction of mobile expenses would have helped, except for the fact we put in a **travel freeze** when the pandemic started.”

- “More importantly our organization already had distributed laptops to a majority of the employees. **Our employees have been working with Homepages and Tiles for some time now** (a few years) so this is what they know and are accustomed to. We do not have a large population using their phones to access our system. But having that ability is helpful.”

What they would change

When we asked customers what they would do if they had to do it again, we learned three things.

- Most wouldn’t change their approach, regardless of what it was.
 - “No we would not change how we rolled out Fluid User Interface. **We took a slow and gradual approach** to rolling out the look and feel. Since we started with Employee Self-Service first, when Fluid was enabled for the core users, those users were already familiar with the look and feel. **This reduced the need to train users** on the ‘new’ look.”
 - “I am not sure I would change anything in our roll out. **We went pretty big bang** for a county. Everything went from a pagelet look for HR users to homepages and tiles and for FIN users they went from menu driven to homepages and tiles. **It went VERY well**, with very few questions at go live (less than 30). And most of the questions were how to create their own homepage and tiles.”
- Many said they would do more, and they would do it faster.
 - Use more homepages and navigation collections
 - Research and implement available features
 - Do more with Activity Guides
 - Start using Notification framework earlier

- Sunset Classic navigation sooner
- Embrace Fluid Branding more
- Use more Fluid interactive dashboards
- Several shared some advice.
 - Evaluate security permissions and impacts carefully
 - Focus on process and people (versus IT)
 - Focus on how to add attachments sooner
 - Be better equipped in terms of operations team preparedness
 - Consider a cloud-based implementation

Was it worth it?

When we asked customers if it would be worth it to adopt Fluid now (mid-pandemic), here's what we learned.

- Two customers acknowledged that it might be challenging for some customers to take on now.
 - "I think we would try to move to Fluid; however, with the massive, unexpected changes that we have had to make, I doubt we would have been able to. We are grateful we had made the changes needed to put us in a good position to tackle what we needed to for the last 6+ months."
 - "Given the devastating financial impact caused by the pandemic I don't believe the Management Board would be in a position to prioritize the funding for a move to Fluid. At the moment the only IT investment is in compliance and critical stay-in-business projects."
- **Nearly every customer** said they would make it a priority to implement Fluid now, if they weren't already using it.
 - "Yes, we'd recommend organizations pursue the move to Fluid, pandemic or no pandemic. It has been quite worthwhile overall."
 - "[We are no longer a Classic customer] but if we were, we would transition to fluid, irrespective of the external conditions."
- **Quite a few** customers have projects under way in areas where they continue to have business critical needs.
 - "We needed a way to deliver online services...processing invoices (PRC) and receiving payments (eBilling). With eBilling, our Service Centers that closed during the pandemic need to "re-open" virtually. eBilling is going to allow us to do this for them."
 - "Yes - Actively working on this effort but dealing with budget constraints."

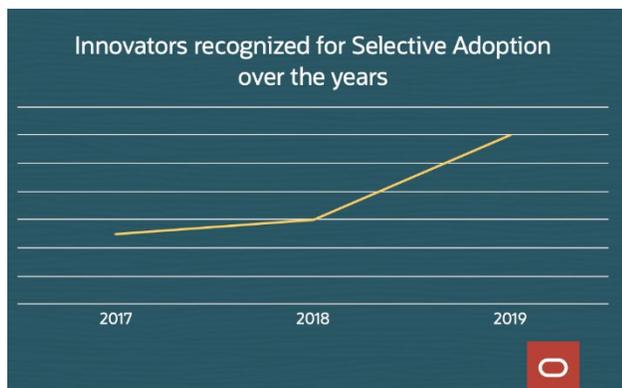
Selective Adoption

Innovator insights

There are 19 Innovators recognized for Selective Adoption. 40% of the innovators have stated that they use Selective Adoption to stay current with the new features as they are released.

Four Innovators are using Test Automation in their PeopleSoft setup:

- Hackensack Meridian Health
- Hays Specialist Recruitment
- King County, WA
- Mutual of Omaha



Survey insights

Most significant impacts

When asked how the pandemic is affecting Selective Adoption all those responded said their fundamental strategy has not changed. However, it has had an impact on:

- **Team structures**
- **Other projects**
- **Increased focus on features that improve efficiency and user experience**
- **Stronger push to Fluid, removing Classic navigation**
- **Increased focus on agility**

Here are some customer quotes:

- “Pandemic didn’t impact the way we had been selecting features/initiatives within PeopleSoft. It has however, **impacted a few other projects and our team structuring.**”
- “With so much focus/reliance on remote work, **we continue to identify features that improve efficiencies and make the user experience a positive one.**”
- “Our strategy has changed somewhat, since we have begun discussing creating more Fluid dashboards and removing classic navigation from the power users of the system. This will **enable the functionality of the system to be accessed quicker for our team members no matter what device they accessing the system with.**”
- “From a deployment perspective the biggest change has been the agility required to deliver the solutions outlined above. Hays have **become exceptionally agile with our deployments over the past 6 months** resulting in a very different business expectation. This alone adds value not least in the savings on lengthy legacy requirements gathering and documentation and testing but also in the adoption of a fix forward approach across the board.”

Most useful capabilities

Innovators deployed the following features during the pandemic:

- Fluid Employee Self Service
- Legislative and regulatory changes
- Upgrade to PeopleTools
- Payroll changes
- Fluid Open Enrollment

Future plans

When asked what they are planning to do next most customers have a healthy list of plans.

- Implement Kibana and PeopleTools 8.58 Upgrades and “Get Current” on application images

- Deploy new features: Job Data Modernization, Fluid Open Enrollment, etc.
- Deploy new products: Time and Labor, Program Management, Expenses

Here are some customer quotes:

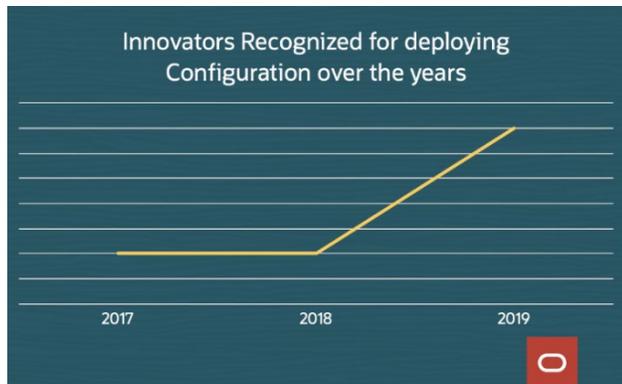
- “Every two years we do a new release tools and full PUM upgrade. 2021 is the year **we will upgrade to tools 8.58 with the PUM delivered by end of 2020**. Our detailed, extensive and time tested, project plan has proven to address any mitigating factor such as this pandemic.”
- “Selective adoption has made it possible for us to **consider implementing Kibana** in our next upgrade to provide enhanced reporting to our users.”
- “We **love Fluid Activity Guide** and intend to use that functionality to improve and automate our processes.”



Configuration

Innovator insights

Fifteen Innovators were recognized for Configuration.



Survey insights

Most useful capabilities

The tools delivering the most value are the same ones most frequently mentioned in Innovator submissions through the years:

- Page & Field Configurator
- Event Mapping
- Approvals Page Composer
- Forms and Approval Builder
- Drop Zones
- Navigation Collections

If they had to do it again

If they had it to do over again several said they wouldn't do anything differently. Nearly all said the lesson they learned is that they should have done more.

- More time to review and remove more customizations with Page & Field Configurator.
- Expand the scope of both Page & Field Configurator and Approvals Page Composer to include more business scenarios.
- Start using Drop Zones.

Here are some customer quotes:

- “Although we were able to eliminate several customizations with Page and Field Configurator this is an area **we should have taken a bit more time to review and remove more customizations by utilizing this tool.**”
- “We don't believe we would have done anything differently. Moving forward we would like to **expand our use of page composer/page and field configurator and also explore other items such as drop zones, etc.**”

De-customizing

All customers said they would prioritize de-customizing amidst the pandemic, if they had not already done so.

Here are some customer quotes:

- “Yes. We continue to look for ways to improve our digital transformation and to be innovative. **The current pandemic has made it even more important for these efforts.** We continue to provide operational excellence and an improved user experience to the entire organization, both onsite and remote.”
- “Yes, Page and Field Configurator has **eliminated old customizations and saved new ones as well.** Navigation Collections has been a huge win within our organization.”
- “We would **most definitely start making use of the configuration tools provided,** had we not done so during our recent update.”

Chatbots

Innovator insights

Three Innovators were recognized for deploying Chatbots with Oracle Digital Assistant. This is one of the newest ways that PeopleSoft customers are modernizing their user experience. The following Innovators are using Oracle Digital Assistant with their PeopleSoft Applications:

- Honeywell
- Loyola University Chicago
- Southern Company

Early customer insights

Early-moving customers are sharing results that signal this is an area that could deliver significant cost and operational savings for customers, while modernizing their user experience. Looking across these customers, the following observations emerge:

- All three customers deployed chatbots to provide support for casual users. Two used bots to serve employees and managers for PeopleSoft HCM, and one used bots to serve students and advisors that need support with PeopleSoft Campus Solutions.
- All three used the bots to answer questions and help resolve issues, reducing the cost and impact on limited support staff and help desk agents
- Beyond answering frequently asked questions, the bots were used to perform tasks such as updating employee profiles, reporting time, requesting leave, submitting manager transactions and reporting and analytics
- In addition to working with PeopleSoft, the bots were deployed in heterogeneous environments that included third party help desk ticketing systems and third party collaboration platforms
- Multi-language support was cited by two customer as beneficial in serving their multi-lingual population
- One customer used the bot to respond to the increased questions and support required as a result of COVID-19

The benefits of chatbots

In terms of benefits, the customers cited:

- Reducing operating costs
- Automating tasks that typically fall to departmental experts or help desk agents
- Providing 24x7 support
- Providing a better, conversational experience
- Better response accuracy as compared to first-call human interactions

Statistics and insights from Loyola University Chicago

86%

Questions answered correctly, compared to 74% by first-call human interactions

91%

Positive feedback from users

- **What has been the biggest benefit of using chatbots?**

“Basically we need more throughput to answer questions from students, parents and alumni. As a non-profit we have limited budget and limited staff. We would prefer that the staff we have provide the meaningful in depth services to our constituents. The bot let’s folks get easy answers 24x7. We don’t have the funding for the shifts to cover that type of support.”

- **What have you learned that you’d share with others about deploying and using bots?**

“The old adage don’t try to boil the ocean is true in this case. Do what is easy and understood and don’t do a complicated area first. Also you need to remember that this isn’t once and done. You have to invest in the bot and keep it ‘smart.’ Pay attention to what

people are asking, once you get in a rhythm you can then get ahead of your constituents and have answers ready for them.”

- **How important are you finding bots in your overall strategy to respond to the pandemic?**

“We just did a full deployment for our bot LUie to answer more than 75 COVID related questions. As mentioned, as a non-profit, the bot is key to provide another layer of self-service at a price that is way cheaper than a staff member. It allows the staff to focus on the more challenging services.”



Oracle Cloud Infrastructure

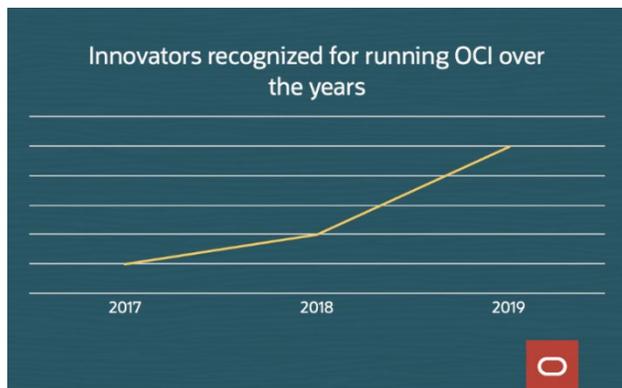
Innovator insights

Seventeen Innovators were recognized for running PeopleSoft on Oracle Cloud Infrastructure (OCI). 88% of the Innovators are running their Production instance on OCI. 47% of the Innovators say that running PeopleSoft on OCI have identified cost savings and the decrease in total cost of ownership as the most significant benefit.

While customers in the higher education industry were some of the earliest to adopt OCI, it is now common across all industries, including public sector, healthcare, financial services, technology, non-profit aid organizations, and utilities. Likewise, Innovators are using the cloud across all regions, globally.

The following Innovators are using PeopleSoft Cloud Manager:

- Aon Risk Services
- Care Inc.
- Gallaudet University
- The Adecco Group



New customers use OCI

Many customers buying and implementing PeopleSoft for the first time are choosing to run their systems in the cloud. This trend is clearly visible both in the Innovators program and in the broader PeopleSoft community. Customers like [First Financial Northwest Bank](#) join global universities and large US state-wide implementations of PeopleSoft that are being run exclusively in the cloud. The speed and elasticity of the environment infrastructure allow for flexibility

during the implementation project, and going live in OCI enables these customers to operate and automate in the cloud from the outset.

Various cloud use cases

While most PeopleSoft customers adopt OCI for all of their production and non-production use cases, there are many examples of customers who use cloud infrastructure in a more targeted or selective way, including:

- **Testing:** Aon Risk Services used OCI to gain access to additional test environments beyond their existing capacity.
- **Adopting New Features:** When all of their existing environments were on an older version of Tools and occupied with a traditional upgrade project, the [University of New South Wales](#) used OCI to create environments that were on the required level of PeopleTools to enable their Fluid adoption project to run in parallel.
- **Disaster Recovery:** [King County, Washington](#) adopted OCI for disaster recovery and business continuity as a first step in their cloud adoption, and is now working on a full environment migration into OCI.

Lifting and shifting

As PeopleSoft customers make the decision to replatform all of their PeopleSoft environments into OCI, the timeframe and approach varies.

- [Southcoast Health](#) moved from a third party hosting provider into OCI in two months with the help of a partner.
- [Gallaudet University](#) combined the move to OCI with a 9.2 upgrade.
- [The State of Texas Comptroller of Public Accounts](#), who runs the state-wide implementation of PeopleSoft for all agencies, worked with a partner to move their very large fleet of over 120 environments to OCI in seven months.

The benefits of cloud

The Innovators cited a wide variety of benefits for running PeopleSoft in Oracle Cloud Infrastructure:

- Reduced operating costs
- Increased agility and responsiveness to business or project requirements
- Improved system performance
- Increased system security
- More reliable system stability
- A high availability architecture



Appendix

List of innovators

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|------------------------------|---|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| Higher Ed | Arizona State University Graduate College | | x | | | x | | | | |
| | Butler University | x | | | | x | | | | |
| | Deakin University | x | x | x | x | x | x | | | |
| | Federation University Australia | | x | | | x | | | | |
| | Gallaudet University | | | x | | | | | x | |
| | Griffith University | x | | | | x | | | | |
| | Lone Star College | x | x | x | | x | | | | |
| | Syracuse University | | x | | | x | | | | |
| | The Catholic University of America | | | x | | x | | | | |
| | The University of New South Wales | x | | | | x | | | x | |
| | University of California, Berkeley | | | x | | x | | | | |
| | University of Canterbury | x | | | | x | x | | | |
| | University of Colorado | x | | | | x | | x | | |
| | University of Florida, Health | x | | x | | x | | | | |
| | University of Tasmania | | x | | | x | x | | x | |
| University of the Free State | x | | x | | x | | | | | |

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|---------------|---|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| Public Sector | Alameda County | | | x | | x | x | x | | |
| | Clackamas County, Oregon | | x | x | | x | x | | | |
| | Clerk & Comptroller, Palm Beach County | | | x | | x | x | x | | |
| | Commonwealth Of Massachusetts (EOTSS) | x | | | | x | | | | |
| | Hennepin County, MN | | x | | | x | | | | |
| | Kansas City Power & Light | | x | | | x | | | | |
| | King County, WA | | | x | | x | x | x | x | |
| | Port of Seattle | | | x | | x | | x | | |
| | San Joaquin County | | x | | | | x | | | |
| | Sandia Labs | x | | | | x | | x | | |
| | State of Texas Comptroller of Public Accounts | | | | x | | | | x | |

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|-------------|------------------------------------|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| Health Care | Adventist Health System | | x | | | x | | | | |
| | Anne Arundel Medical Center | | | x | | x | | | x | |
| | Community Health Network | | | x | | | x | | | |
| | Hackensack Meridian Health | | x | x | | x | x | | | |
| | Intermountain Healthcare | | x | | | x | | | | |
| | Medife | | | x | | | | | x | |
| | Orlando Health | | | x | | x | | | x | |
| | Rady Children's Hospital-San Diego | | x | | | x | | | | |
| | Southcoast Health | | | x | | x | | x | x | |
| | Temple University Health System | | | | x | x | | | | |

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|----------------------------------|------------------------------------|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| Financial Services and Insurance | Aon | | x | | | | | | x | |
| | Chaucer Underwriting Serviced Ltd. | | | x | | | | | x | |
| | European Investment Bank | | x | | | | | | | |
| | First Financial Northwest Bank | | | x | | | | | x | |
| | Goldman Sachs & Co | x | | | | | | | | |
| | Lockton Companies | | | x | | | x | | | |
| | Mutual of Omaha | | x | | | x | x | x | | |
| | Navy Federal Credit Union | | x | | | x | | | | |

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|-------------------------------------|---|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| All Other Industries | Alaska Airlines | | | x | | x | x | | | |
| | Allen & Overy - Global HR Systems Team | | x | | | x | | | | |
| | Alliant Energy | | | x | | x | | | | |
| | Birlasoft | | x | | | x | | | | |
| | Black Hills Corporation | | x | | | x | | | | |
| | Buss Group and FPG Raffles Group | | x | | | | | | x | |
| | CARE | | x | | | | | | x | |
| | CDW LLC | | x | | | x | | | | |
| | Cognizant Technology Solutions | x | | | | | | | | |
| | Community Foundation of Northwest Indiana | | | | x | x | | x | | |
| | Dick's Sporting Goods | | | x | | | | | | |
| | Disys | | | | x | x | | x | | |
| | Domino's | | x | | | x | | | | |
| | East Kentucky Power Cooperative | | | x | | x | | x | | |
| | Endeavour Foundation | | | x | | x | x | | x | |
| | FTI Consulting | | | | x | x | x | x | | |
| | Hays Specialist Recruitment | x | | x | | | | x | | |
| | Honeywell | | | x | | | | | | x |
| | Jack Henry & Associates, Inc. | | x | | | x | | | | |
| | KAR Global | | | | x | x | | x | | |
| Norwegian Cruise Line Holdings Ltd. | | | x | | x | x | | | | |
| Oceaneering | | | x | | | | | | | |

| INDUSTRIES | INNOVATORS LIST | YEAR OF RECOGNITION | | | | INNOVATOR CATEGORY | | | | |
|----------------------|--------------------------------|---------------------|------|------|------|--------------------|--------------------|---------------|-------|---------|
| | | 2017 | 2018 | 2019 | 2020 | User Experience | Selective Adoption | Configuration | Cloud | Chatbot |
| All Other Industries | Oxford Global Resources | | x | | | x | | x | | |
| | Reed Smith, LLP | | | x | | x | | | | |
| | Saint-Gobain UK Ltd | | | x | | | | | | |
| | Southern Company | | | x | | | | | | x |
| | The Adecco Group | x | | | | x | x | | x | |
| | Torneos y Competencias | | | x | | | | | x | |
| | WestRock | x | | | | x | x | | | |
| | Weyerhaeuser Company | | x | | | x | | | | |
| | White & Case LLP | | | x | | x | | x | | |
| | WNS Global Services Pvt. Ltd., | | x | x | | x | | | | |

Submit a nomination

- [Feature Innovator Nomination Form](#)
- [PeopleSoft Innovator Nomination Form](#)

Additional reading

- [PeopleSoft Innovator Stories](#)
- Blog Posts:
 - [Lone Star College](#)
 - [Texas Comptroller of Public Accounts](#)
 - [Customer Roundtable - PeopleSoft Innovators of 2020](#)
 - [Get Rewarded for Your Success with the New and Improved PeopleSoft Innovators Program](#)

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