



PeopleSoft

# RECONNECT

ENVISION

## KP's Experience Implementing Oracle Guided Learning

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# What is Guided Learning

- Oracle's in-application learning tool
- Walks users step-by-step through transactions in your production instance



# Training Currency Dilemma

- KP's PeopleSoft platform includes 16 modules, three bolt-ons and several Forms
- After KP upgraded to 9.2 it took one year to update KP's UPK job aids
- When KP started its fluid journey one year later, the UPKs became outdated
- A better way to update and maintain the training materials was needed, including a better way to train users

# Why Guided Learning

- In-application learning tools are a better way to train
- KP needed program that would support a sustaining model
- KP was implementing Oracle's HCM Cloud including Guide Learning
- It made sense to use the same platform to deliver a consistent experience across these enterprise systems

# Goals of KP's Guided Learning Implementation

1. Increase adoption for new users
2. Assist experienced users to adapt to changes introduced through Updates or enhancements
3. For all users ease the frustration and time required to complete a task

# Implementation Approach

Prioritized order of modules to include:

#1. Large casual audience. e.g., Expenses

#2. External audience, e.g., eSettlements

#3. Modules where new users are added frequently, e.g., Inventory

Evaluated transactions to include:

- Mileage – 185K expense lines over a 6-month period
- Par Counts – excluded as primarily completed on handheld device
- Requested business feedback on selected transactions

# Guided Needs Assessment (GNA) Approach

- GNA is the “requirements document” for Oracle development
- Approach evolved over time
  - GNA Development
    - FROM starting with a blank piece of paper > TO starting with steps from UPK job aids
  - Business engagement
    - FROM engagement at the start of GNA development > TO engagement after a draft guide became available
  - Oracle Development engagement



# GNA Sample/End Product

Create an Expense Report As Owner or Preparer		
STEP #	Step Description Type	Step Description Value
0	Step Description Introduction	<p>Create an expense report as owner or preparer</p> <p>Use this guide if you are creating an expense report as an owner or preparer.</p> <p>Note: Please take your time and follow each guide step as directed. Taking actions outside of the guided steps will cause the guide to stop,</p>
1	Step Description	Click Expenses.
1	Step Note	
1	Step Deep Link	
1	Step Smart Tip	
1	Regional Exception	
2	Step Description	<p>Confirm <b>Employee ID</b> of the person you are creating the Expense Report for. If you are creating the expense report as a preparer, click on the magnifying glass and search for the Employee ID of the person (Expense Report Owner) you are creating the expense report for.</p>
2	Step Note	
2	Step Deep Link	

**Create an expense report as owner or preparer**

Use this guide if you are creating an expense report as an owner or preparer.

Note: Please take your time and follow each guide step as directed. Taking actions outside of the guided steps will cause the guide to stop, and you will need to return to the homepage to start over.

Next

**Expense Report**

Find an Existing Value | Add

Empl ID: Z700582

Add

Find an Existing Value | Add a New Value

**Confirm Employee ID of the person you are creating the Expense Report for.** If you are creating the expense report as a preparer, click on the magnifying glass and search for the Employee ID of the person (Expense Report Owner) you are creating the expense report for.

Next

# Scope of Implementation

Module	Guide Count
AP	11
Asset Management	32
ePro	16
eSettlements	25
Expenses	38
FDA	19
General Ledger	12
Grants	27
Inventory	34
PAR Setup and Maintenance	35
Lease Accounting	8
Payroll Allocation Tool	6
Pharmacy	14
Purchasing (PO, Receiving and RTV)	25
Project Costing/Commitment Control	27
sPro/SCM/Strat Sourcing	20
<b>Total Guide Count</b>	<b>349</b>

# Adoption Approach

- Awareness campaign
  - Introduction to Guided Learning video
  - Website article, flyers and emails to users each time a module launched
- Target new users and users assigned new roles
  - Email distributed to these audiences every other week
- Target audiences for new functionality
  - Website article, flyers and emails
- Proctored training for new implementations/audiences
- Course in KP's learning management system
- Articles in ServiceNow (KP's ITSM system) Knowledge Base

# Biggest Wins

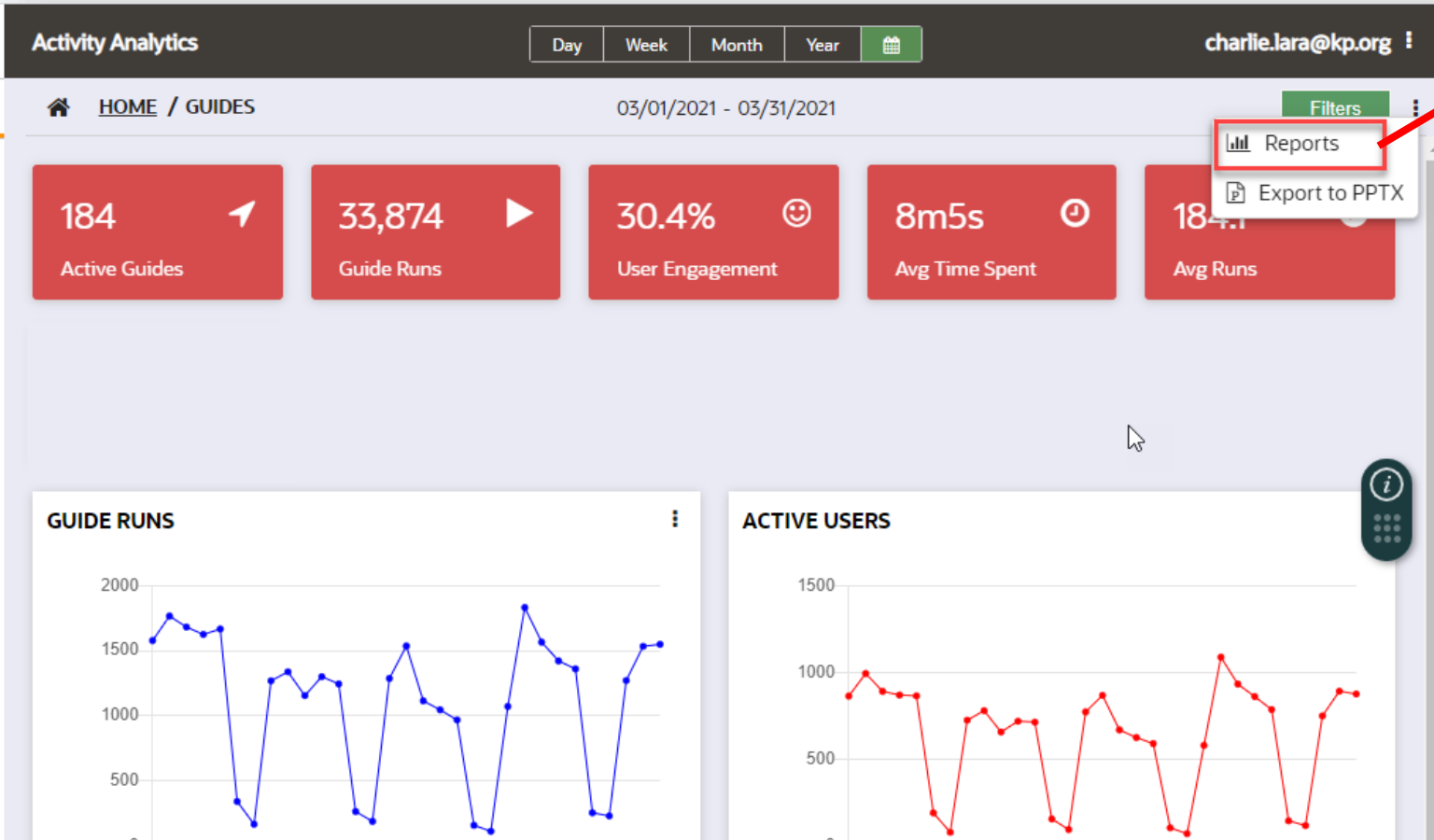
- Most frequently used guides
  - Expenses, ePro and eSettlements
  - Guides introduced with new/changed functionality

Guide Name	Time Period	Engaged Uses
<b>Prepare Expense Report</b>	Quarter before Fluid implementation	133
<b>Prepare Expense Report</b>	Quarter after Fluid implementation	834
<b>Create A Check Request for Payment</b>	Quarter after implementation	1026

- Flash Tips are highly effective outside the guides to alert users to changes or application issues
- Task Lists are being utilized

# Analytics

## Home Page



## Reporting Page/Features

**Report Type**

Guide | **User** | Feedback | Bulk

All Users |  Select User(s) |  Select User(s) and Guide(s)

**Date Range**

Day | Week | Month | Year

From: 2021-03-01 To: 2021-03-31

Use it |  Do not use it

**Application(s)**

All |  Select Application(s)

Select Application(s)

**User(s)**

All |  Select User(s)

**Guide Type**

All |  Select Guide Type(s)

**Guide Status**

All |  Select Guide Status(es)

**Report for Kaiser Development A**

Report Type: User (select User(s) and select Application(s): 2/1 (all/selected), Guide Type Module: 0 (selected), Training Type: ALL, D Platform: Desktop, Mobile, Guide Managen

+ Notes

Update Preview | Download Report

Row Count: 58

GUIDE NAME	GUIDE ID
Add/update chartfield or budg...	33isyrr
Inquire on budget details	rkiqw6rv
View or print an expense report	s0u0u7h8
ST-Spro-Route Document for C...	6mpp4knv
ePro Requisition Minimum Ord...	gy9wgxkf
ST-Create par location	lipilyzk
Modify FDA delegation	n14hff7y
OneLink Website	mcyusz3a
ST-Create pharmacy recharge-...	tqurjnse

# Lesson's Learned

- Starting with blank GNA template was frustrating and inefficient
  - Using existing job aids improved and expedited the development of draft GNA templates
- Engaging business after a draft guide was available was more effective than engaging business at the start of the GNA process
- Once the tool and process was defined and understood, velocity of development increased

# Benefits

- Ongoing guide maintenance for PUMs or KP driven enhancements
- Effective way to inform users of changes or issues
- Reduction of job aids and associated maintenance overhead
- Usage Reporting
- Efficient way to learn in the production environment
- Potential for decrease in 'How To' calls to Production Support