



**Utilizing 9.2 Fluid and Classic
to Optimize FSCM Operations**



Larry Zagata

Managing Partner, VP Delivery

Larry.Zagata@miproconsulting.com

989.964.8206 (M)

- 25 years information technology experience
- 19 years PeopleSoft experience
- 9 years working at PeopleSoft

1. Presentation goals
2. Customer example background
3. Solution
4. Demo
5. Blogs/White Paper
6. Q&A



Goal 1: Learn about the current capabilities of PeopleSoft 9.2. The power of PeopleSoft can be configured to improve the user experience and make daily operations significantly more efficient.

Goal 2: Learn how to configure PeopleSoft for optimization - Through the use of Fluid tiles, pivot grids, fluid navigation collections, work centers, embeddable pagelets/dashboards, and drilling URLs, PeopleSoft Procurement can be efficient.

Take these concepts back to your organization and use this new knowledge to promote a better user experience leveraging PeopleSoft.

Customer/Situation Background

- ↘ High volume of procurement
- ↘ Centralized procurement operations
- ↘ Dedicated buyers to support internal requisitions and goods for operations
- ↘ Upgraded to PeopleSoft 9.2, but performed a “technical only” upgrade
 - No new 9.2 features deployed
 - No new Tools 8.5x features deployed
 - No Fluid deployed
- ↘ Very manual intensive approach to operational support
 - Buyers run queries, print results, navigate to source pages and investigate
- ↘ Executives cannot get the data they need in a timely manner
 - Run daily queries and BI publishers reports scheduled
- ↘ Experiencing high turnover and also growth
 - Effective training an issue and concern
- ↘ Organization is becoming more mobile and working remotely

Menu

Search:

- My Favorites
- Novation
- Data Expansion Tools
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Customers
- Partners
- Products
- Catalog Management
- Customer Contracts
- Order Management
- Pricing Configuration
- Customer Returns
- Items
- Cost Accounting
- Suppliers
- Procurement Contracts
- Purchasing
- Inventory
- eProcurement
- Services Procurement
- Sourcing
- Engineering
- Manufacturing Definitions
- Production Control
- Quality
- Supply Planning
- Grants
- Program Management
- Project Discovery
- Project Costing
- Proposal Management
- Maintenance Management

- Executed an Optimization Workshop
 - Formal structured approach understanding challenges, turning challenges into objectives and aligning objectives within the organization
- Prioritized projects/optimization from the workshop

Objective	Challenge	Success Criteria
Optimize the use of PeopleSoft through work centers, fluid, navigation collections and other new features.	A, E	<ul style="list-style-type: none"> - Deploy work centers - Deploy fluid approvals - Deploy pivot grid tiles - Deploy Home Page content personalized - Deploy Fluid navigation collections - Utilize drilling URL's within queries
Design PeopleSoft in a manner that improves the ability to train new resources	B, C	<ul style="list-style-type: none"> - Onboarding time is reduced by 25% - Time for resources to be self-sufficient is reduced by 25% - Deploy Fluid content
Provide timely access to data and key information for buyers	D	<ul style="list-style-type: none"> - Deploy fluid pivot grids - Deploy work centers - Personalize work centers with embeddable pagelets
Provide timely access to data and key information for executives	G	<ul style="list-style-type: none"> - Create Fluid Homepages for executives to access anywhere, anytime
Increase the ability to use mobile devices for buyers	F	<ul style="list-style-type: none"> - Implement fluid approvals - Implement fluid pivot grids

- Leveraged the Optimization results, for a deep dive product review
- Executed on design and development, transforming the procurement operations
 - Deployed Fluid Procurement content
 - Deployed Fluid Navigation Collections
 - Deployed queries with drilling url's
 - Deployed Buyer work center (personalized)
 - Created executive Fluid Homepage with fluid pivot grids and simplified analytics

DEMO

- Go through the optimization process
- Leverage the capabilities of the toolset
- Configure, don't customize
- Personalize
 - Provide the access with training
- Use Fluid
 - Can introduce Fluid in a strategic manner

All of these improvements are discussed in detail in “how to” instructional blogs.

- How to create fluid navigation collections: <https://blog.miproconsulting.com/2016/11/fscm-navigation-collection-configurations/>
- How to create fluid pivot grid tiles: <https://blog.miproconsulting.com/2016/11/create-fluid-pivot-grid-tile/>
- How to configure work centers:
 - Part1: <https://blog.miproconsulting.com/2017/03/configuration-of-workcenters/>
 - Part 2: <https://blog.miproconsulting.com/2017/04/workcenter-configuration-part-2/>
 - Part 3: <https://blog.miproconsulting.com/2017/04/pagelet-personalization/>
- How to create drilling urls: <https://blog.miproconsulting.com/2012/06/peopletools-query-drilling-url/>
- Enhanced Fluid Approvals: <https://blog.miproconsulting.com/2016/09/image-20-fluid-approvals/>
- Creating simplified analytics: <https://blog.miproconsulting.com/2016/10/simplified-analytics/>
- PeopleSoft fluid and classic work center scope: <https://blog.miproconsulting.com/2016/11/peoplesoft-workcenter-scope/>

ENGAGE MIPRO FOR AN OPTIMIZATION WORKSHOP



Visit our website

www.MIPROConsulting.com for more information or call us to schedule an Optimization Workshop for your organization.



Larry Zagata

Managing Partner, VP Delivery

Larry.Zagata@miproconsulting.com

989.964.8206 (M)



"101 Best & Brightest Companies to Work For" 11 years in row (2006 – 2016)



"Cool Places to Work" Four times 2007 – 2014

Our Heritage

- Founded in 2005, 500+ engagements throughout North America
- Dedicated exclusively to PeopleSoft engagements

Our Passion

- Award winning culture attracting most experienced talent anywhere
- Integrity – we take great pride in consistently doing the right thing

Our Focus

- PeopleSoft Financials, Supply Chain, ALM and HCM
- Upgrades, Implementations and Optimizations

Q & A
