Customer Panel
PeopleSoft: Today and the Future

Customers

- Deanne Abbs
  IT Supervisor
  Frankenmuth Insurance
- Tony Schollum
  Executive Director OneLink
  Kaiser Permanente
- Eli Fernandez
  Manager Accounting
  Susan G. Komen

Moderator

Jeff Micallef, MIPRO Co-Founder
Panel Format

• Introductions
• Organization Overview
• PeopleSoft Footprint
• Project Advice/Lessons Learned
• Future Plans Related to PeopleSoft
• Questions from the Audience
Panel Participants

- **Tony Schollum**
  Exec Director, Finance Ops, OneLink(ERP)
  Kaiser Permanente

- **Eli Fernandez**
  Manager, Accounting
  Frankenmuth for the Cure

- **Deanne Abbs**
  IT Supervisor
  Frankenmuth Insurance
ORGANIZATION OVERVIEWS
About Kaiser Permanente

Our Mission
Kaiser Permanente exists to provide affordable, high quality healthcare services to improve the health of our members and the communities we serve.

Our Vision
To be the model for quality health care in the nation by being the best place to work and the best place to receive care.
About Kaiser Permanente

129,000
Inpatient surgeries

116,000
Babies delivered

44 million
Doctor office visits

90 million
Prescriptions filled

994,000
Mammograms

2 million
Colorectal cancer screenings

293 million
Visits to kp.org

132,000
Video visits

26 million
Secure emails sent

25 million
Prescriptions refilled online

6 million
Members registered on kp.org

#PSRECONNECT
About Susan G. Komen

Goal: Reduce breast cancer deaths by 50% by the year 2026.

Community
- Early Detection
- Access to Care
- Patient Navigation
- Health Equity

Research
- Transformative Technologies
- Novel Therapeutics
- Tackling Metastasis
- Addressing Disparities
About Frankenmuth Insurance

Frankenmuth Insurance has been providing peace of mind for families and businesses for 150 years. Because insurance is both complicated and critical to people's lives, Frankenmuth works exclusively with 550 independent agents to provide expert advice on business, home, auto and life insurance policies.

With more than 600 employees, the company is headquartered in Frankenmuth, Michigan, and offers insurance products in 15 states.

Frankenmuth Insurance is financially sound, with $1.5 billion in assets. The company has an A.M. Best rating of "A" (Excellent) and is a Ward 50® Top Performer.
PEOPLESOFORTH FOOTPRINT
Kaiser Permanente: Footprint

Platform Functions

Procure to Pay (Buy 2 Pay)
- eProcurement
- Purchasing
- Inventory & Cost Mgmt
- eSupplier Portal
- Services Procurement
- Accounts Payable
- eSettlements
- Travel and Expenses
- Sourcing & Supplier Contract Mgmt.

Acquire to Retire
- Asset Management
- Lease Management
- Project Costing
- Commitment Control

Fin. Data Warehouse (FDW)
- Reporting / Analytics
- Cognos

Other / Kaiser Custom fns.
- POU (Point-of-Use)
- FDA (Funds Disbursement Authorization)

OneLink
PeopleSoft FSCM 9.2
with EPM Finance
Data Warehouse
(FDW) and 9 “Edge” apps
(PeopleTools 8.55)
Komen: PeopleSoft Footprint

2008/9
• Migration from Solomon and 123 QuickBooks remote installs to PeopleSoft
• PeopleSoft 9.0 with Tools 8.49

2014
• PeopleSoft 9.2 Upgrade
• PeopleTools 8.54.13

2015/16
• Selective Adoption - planning and execution

2017
• PeopleTools 8.55.11 implementation
• Fluid platform implementation and rollout in 3 different phases.

PeopleSoft Modules
General Ledger, Accounts Payable, Purchasing, ePro, Accounts Receivable, Billing, Expenses, Cash Management & Projects
Frankenmuth: PeopleSoft Footprint

Implemented PeopleSoft 7 Financials GL/AP

- Upgraded FMS to 9.1
- Implemented Expenses and Upgraded to Image 14
- Upgraded FMS to 9.1
- Upgraded to Image 28 and Rolling Out Fluid

1997: Implemented PeopleSoft 7 Financials GL/AP
2003: Upgraded to 8.4 Tools
2011: Upgraded to 9.2 Image 8
2014: Upgraded to 9.2 Image 8
2015: Upgraded to Tools 8.56
2017: Upgraded to Tools 8.56
2018: Rolling Out Fluid

PeopleSoft Modules
- General Ledger, Accounts Payable & Expenses
PROJECT HIGHLIGHT
AND/OR
LESSONS LEARNED
Kaiser Permanente: By the numbers

**OUR DEPLOYMENTS**

STANDARDIZED ACROSS ALL OF OUR 8 REGIONS

**12,000,000**

Processes Run Annually

**OUR CAPABILITIES**

- Systems Strategy
- Systems Implementation
- Governance
- Project Management
- Process Optimization
- Reporting and Analytics
- Production Support

**ONELINK BY THE NUMBERS**

246,000 Users

Approximately 12,000 employees use OneLink daily, processing over **75 Million** distinct financial, supply chain and general support transactions annually.

- **Accounts Payable**
  - Transactions: 9.2 Million
  - Amount: $21.8 Billion

- **Purchase Orders**
  - Transactions: 4 Million
  - Amount: $12.2 Billion

- **Expense Reports**
  - Transactions: 500 K
  - Amount: $300 Million

- **General Ledger Journals**
  - Number of Lines: 31.6 Million
  - Journals #: 630,000

**FAST FACTS**

Production Support Tickets

- **39,000** Tickets Opened (2017)
- **38,000** Tickets Resolved (2017)

- **57%** Tickets resolved within 2 days
- **90%** Tickets resolved within 21 days
- **99%** System Availability

LARGEST PEOPLESOFT SINGLE-INSTANCE IN THE HEALTHCARE INDUSTRY
Susan G. Komen: Deploying Fluid

• In March of 2017, we deployed Fluid to our HDQs and 80 affiliate offices.
• Developed a strategy taking into account current needs, future state, product direction and audiences.
• Created two different plans, one for corporate accounting users and the other for the field affiliate office users.

• Susan G. Komen scope
  • Delivered navigation collections
  • Configured navigation collections
  • Personalized homepages
  • Fluid pivot grid tiles
  • Personalized Navigator
  • No custom Fluid transaction pages
Susan G. Komen: Affiliate Interface

Old Screen

New Screen
Susan G. Komen: Lessons Learned

- Fluid rollout strategy – Role-based, impacting only specific groups.
- Personalization for users – Configurable
- Cross reference to identify functionalities variances between the older classic & the Fluid pages.
- Understand the key Fluid permission to align with any custom permission lists to access Fluid pages effectively.
- Test with various browsers & devices – Issues such as with Attachments
- Effective communication and adequate training – Key to success.
Frankenmuth: Key Projects

- Invoice routing and purchasing
- Integration with our Life company start up for both AP and GL
- Bank Transfer Log, first use of AWE
- Implemented 1099 processing. Produce Thompson Reuters PDF
- Implemented journal entry log
- P&C acquisition with AP and GL
- Corporate credit card integration
- Integrations for our Guidewire implementation
  - Billing system
  - Claims System
  - Policy System
  - Warehouse
Frankenmuth: Lessons Learned

• PeopleSoft full-time experience resources are getting harder to find
• Embracing new features from Oracle can satisfy business users
  • Challenge is finding the time to implement these features with other corporate priorities
• Integrations between PeopleSoft and our core systems
FUTURE PEOPLESOFT PLANS
Kaiser Permanente: What’s Next?

**Completed UnO**
- Demand Planning / Inventory Optimization
- Services Procurement
- Fiscal Authority (FDA)
- Optimization
- BI/Analytics

**Move to the Cloud**
- PeopleSoft supported until at least 2030 by Oracle
- Evaluate / Migrate to Cloud products
  - HR - “diving in” first on Oracle
  - Finance & Supply Chain – evolving likely 5-10+ years out
- Participate on Oracle CABs

**Support and Investments**
- Support out 246k Users
- Stay Current
  - Infrastructure Consolidation & Redesign
  - Updates & Release Mgmt. ("PUMS")
  - Data Archiving and Performance Tuning
- Customer Experience – "Fluid" UI
- Optimize and Innovate
  - including RPA, Chatbots and AI
- Data Analytics & Reporting
- Support Other KP Initiatives
- Acquire, Retain and Develop our People

#PSRECONN
Susan G. Komen: What's Next?

• Continue the rollout of more Fluid functionality
  ➢ Role-based dashboards
  ➢ Utilize more pivot grids in our reporting capabilities

• Continuous Agile Development

• GL reconciliation

• Simplified Analytics

• Related Content Mapping

• Elastic Search
Frankenmuth: What’s Next?

- Focusing on staying current with PeopleSoft Images - PI 28 in October
- Utilizing ongoing support services from MIPRO
- Evaluating PeopleSoft ePro & Purchasing
- Enhancing integrations between PeopleSoft and FMI core systems
- Extensively rolling out Fluid to improve the user interface
- Looking for solutions for requisitions and travel
Questions & Answers
About MIPRO

Our Heritage
- Founded by former PeopleSoft execs in 2005
- More than 600 engagements throughout North America
- Dedicated exclusively to PeopleSoft engagements

Our Passion
- Award winning culture attracting experienced talent
- Reputation for being innovative, candid and customer focused
- Integrity—taking pride in consistently doing the right thing

Our Focus
- The success of our customers, achieving their objectives
- PeopleSoft Financials, HCM, Supply Chain, and ALM
- Implementations, Upgrades and Optimizations
Please complete a session evaluation

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Who is the Quest Community?

A 55,000+ member user community for Oracle Cloud, JD Edwards and PeopleSoft customers.

What the Quest PeopleSoft Community offers:

- Customized digital content
- Official PeopleSoft newsletter
- Customer success stories
- Virtual and face-to-face events
- PeopleSoft networking groups

Visit www.QuestDirect.org for more information!