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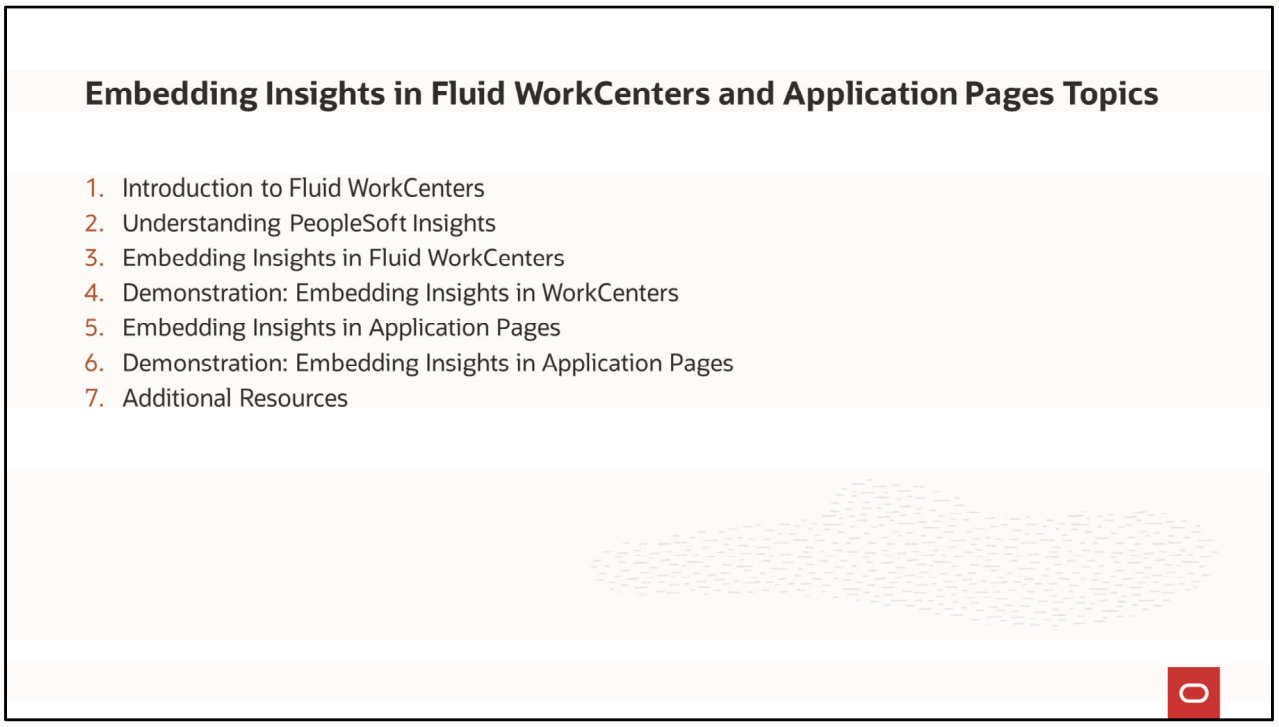
Embedding Insights in Fluid WorkCenters and Application Pages

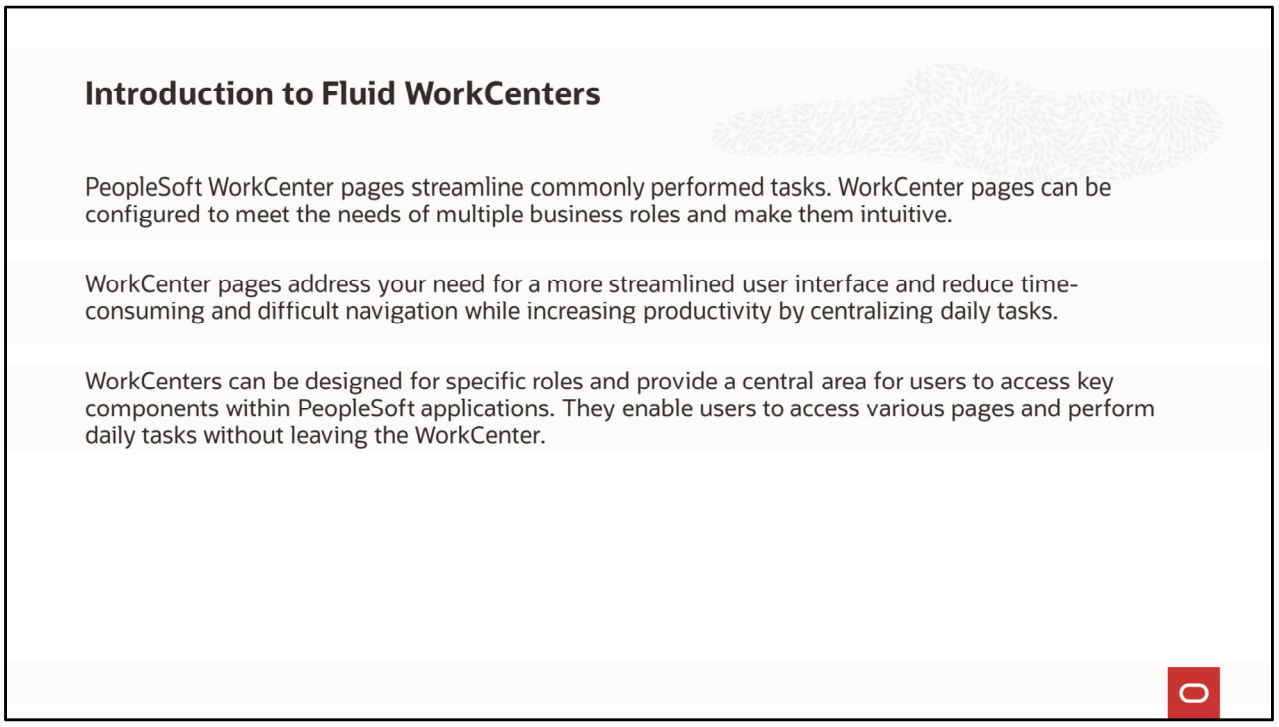


In this spotlight series we'll cover the following topics:

- In the first topic, Introduction to Fluid WorkCenters, we'll briefly discuss the Fluid WorkCenters and how these are used.
- In the Understanding PeopleSoft Insights topic, we'll give an introduction to PeopleSoft Insights and how to access the Insights home page.
- The Embedding Insights in Fluid WorkCenters topic discusses how it helps users to analyze Insights data and take necessary action within the context of a WorkCenter.
- You'll see a demonstration of embedding Insights in WorkCenters.
- The Embedding Insights in Application Pages topic discusses the benefits of embedding Insights in Application Pages and how it helps users to take necessary action within the context of an application page.
- Also, you'll see a demonstration of embedding Insights in Application Pages. We'll use an application class to filter the data in a visualization.
- And finally, the additional resources topic provides links where you can get more information.

Note that this feature is only supported for fluid WorkCenters and fluid application pages.

Let's begin with a brief introduction about using Fluid WorkCenters in PeopleSoft.



PeopleSoft WorkCenter pages provide you the ability to streamline access to commonly performed tasks. You can design and target WorkCenter pages to meet the diverse needs of multiple business roles, providing an intuitive one-stop interface.

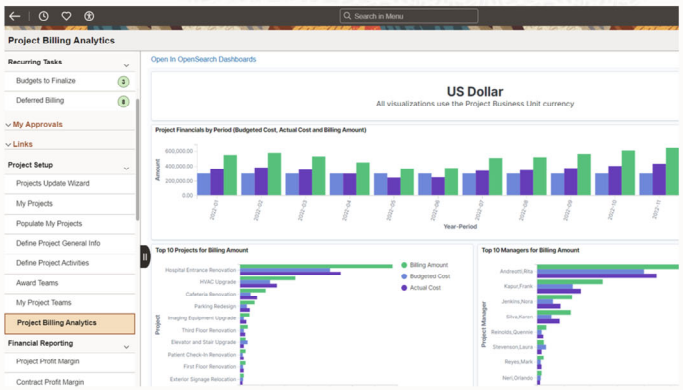
WorkCenter pages address your need for a more streamlined user interface and reduce time-consuming and complex navigation while increasing productivity by providing a central place from which to do day-to-day work.

WorkCenters can be designed for specific roles and provide a central area for users to access key components within PeopleSoft applications. They enable users to access various pages and perform daily tasks without leaving the WorkCenter.

Introduction to Fluid WorkCenters (Cont.)

The WorkCenter consists of two main areas:

- The Navigation area determine the content in the transaction area.
- The Transaction area displays the object that is associated with the link that you click in the navigation area.

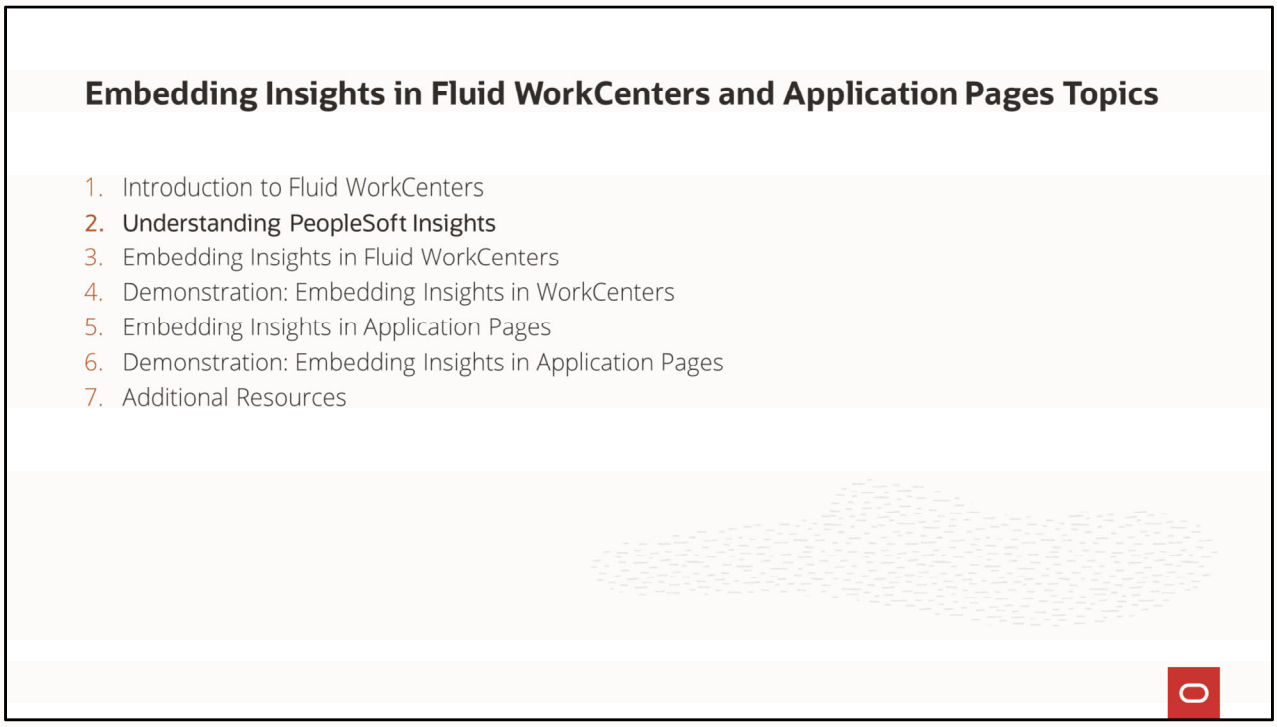


The WorkCenter consists of two main areas - the navigation area and the transaction area.

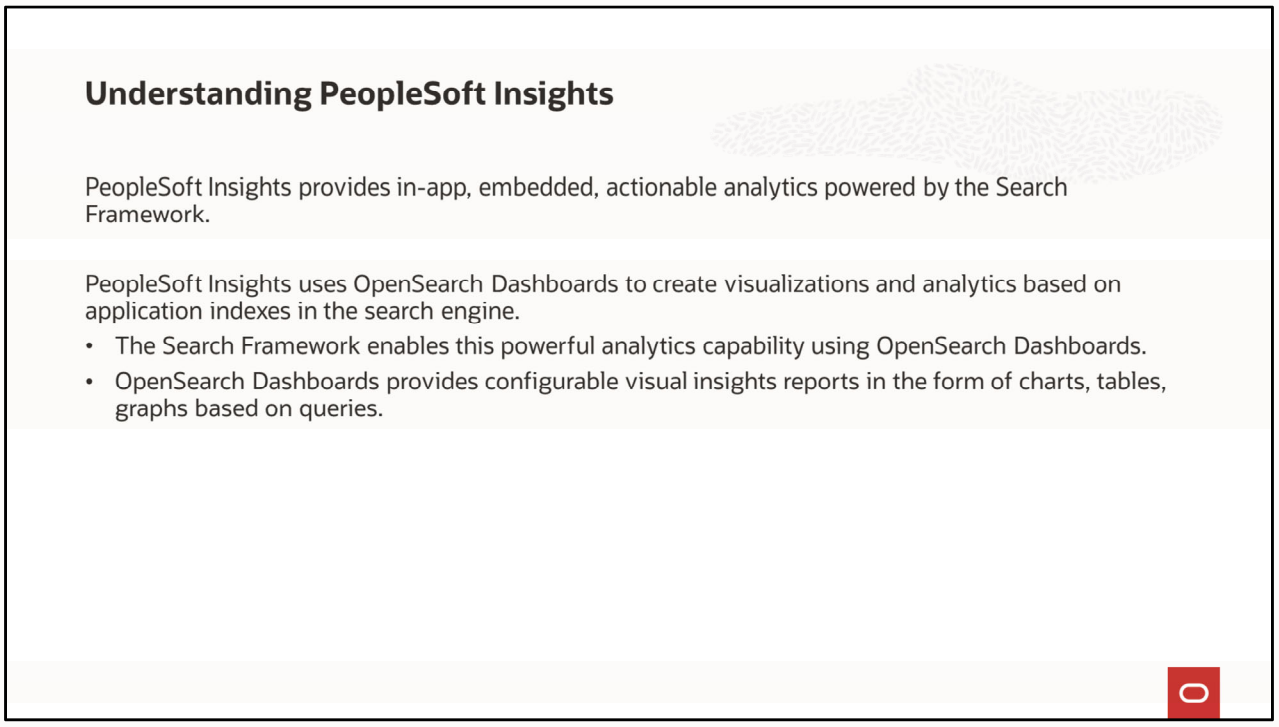
When you click a link in the navigation area, it triggers the appropriate transaction, and passes values from the navigation area so that the application can display the appropriate content in the transaction area or in a new browser window.

Before PeopleTools 8.61, if you had a need to access PeopleSoft Insights from anywhere within the application, you had to leave the current transaction, return to the home page, and then access the Insights from a tile.

PeopleTools 8.61 enables PeopleSoft Insights to be embedded within Fluid WorkCenters, Navigation Collections, and Application Pages, enabling you seamlessly access the power of Insights within the context of where you are.



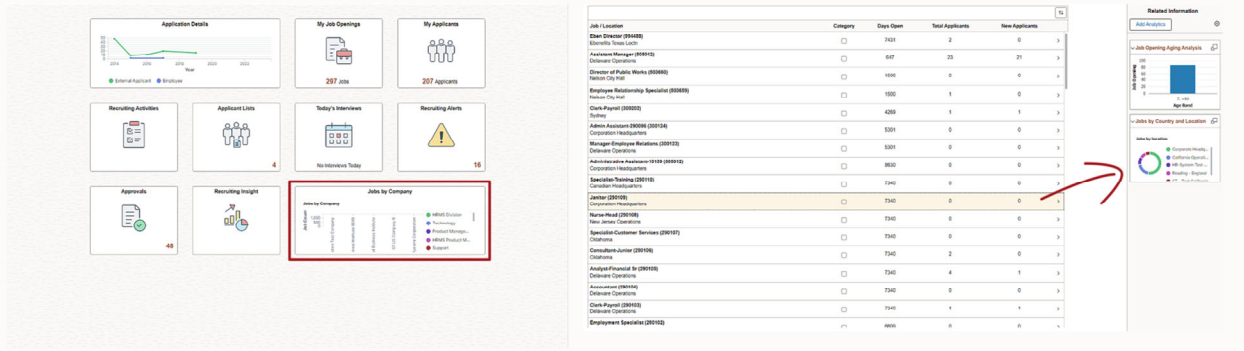
Next, we'll discuss PeopleSoft Insights and its implementation in PeopleSoft.



PeopleSoft Insights provides in-app, embedded, actionable analytics powered by the Search Framework.
PeopleSoft Insights enables you to create visualizations based on application indexes in the search engine.
The Search Framework enables this powerful analytics capability using OpenSearch Dashboards.
OpenSearch Dashboards provides configurable visual insights in the form of charts, tables, graphs, and so on based on queries that you set up on search indexes.

Understanding PeopleSoft Insights (Cont.)

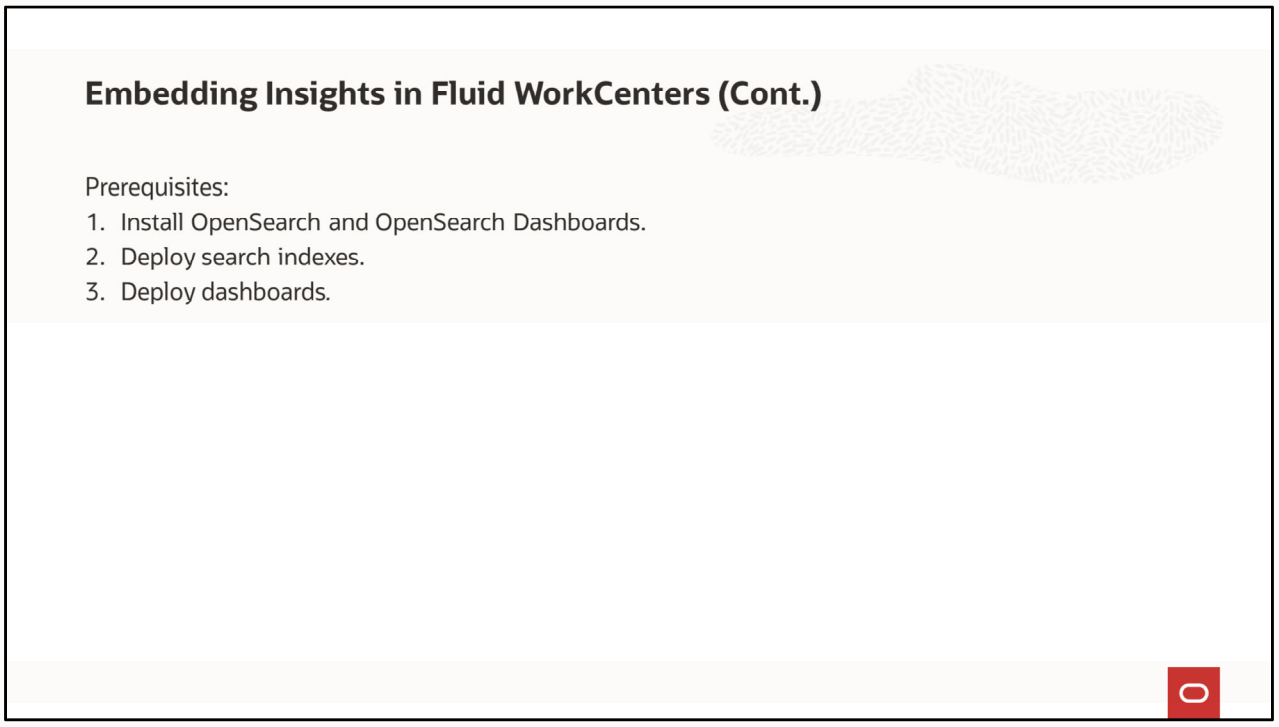
To access the Insights, choose Homepage > Tile and Related Content.



PeopleSoft enables end users to access the insights currently available in the user interface through the Homepage > Tile and Related Content feature.

For more information about working with PeopleSoft Insights, refer to the existing spotlight: Working With PeopleSoft Insights.

Let's talk about the prerequisites and steps to embed Insights in Fluid WorkCenters.



Before you embed Insights, you must ensure the following prerequisites are completed:

- Install OpenSearch and OpenSearch Dashboards. PeopleTools delivers the OSK DPK to install OpenSearch and OpenSearch Dashboards. The DPK gives you the option to install OpenSearch and OpenSearch Dashboards together or separately.

For more information on installing OpenSearch and OpenSearch Dashboards, refer to the Deploying OpenSearch and Working With PeopleSoft Insights spotlight videos, where we have covered the installation steps in detail.

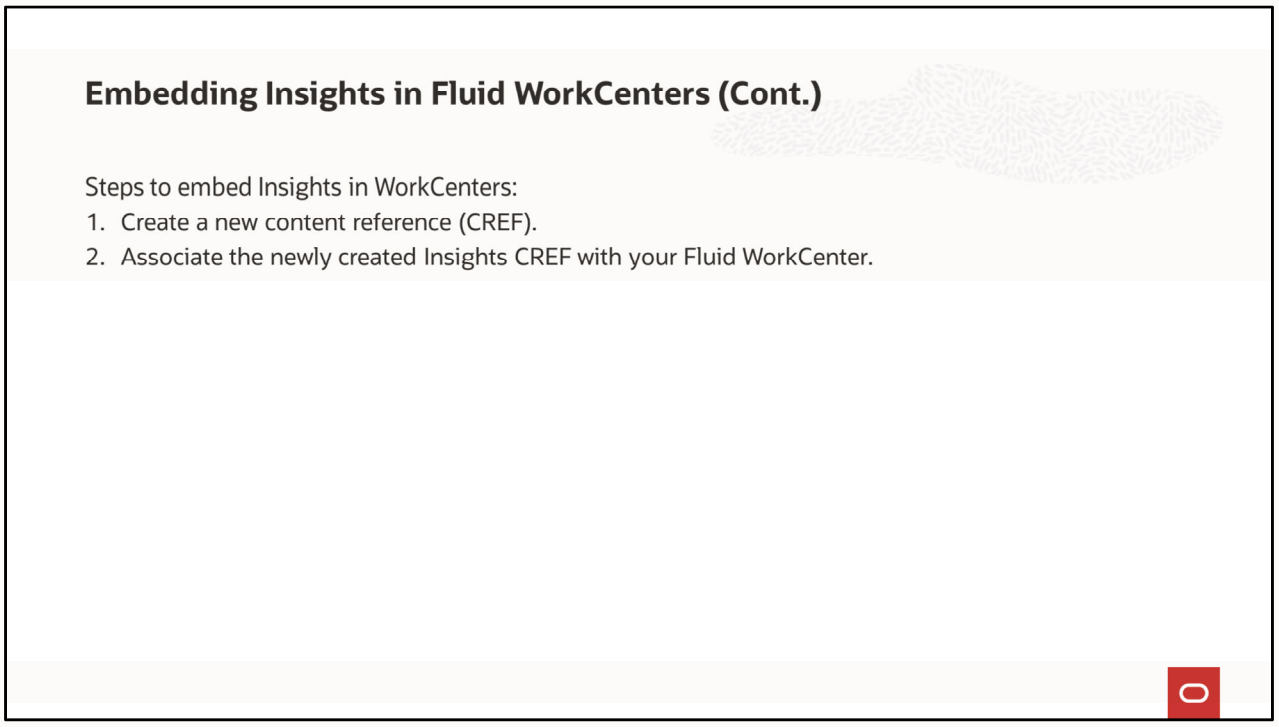
- Deploy search indexes. Ensure the necessary delivered search indexes are deployed and crawled.
- Deploy dashboards. Ensure the necessary delivered Insights are deployed on to OpenSearch Dashboards.

In order to use the delivered dashboards, a user with the Search Administrator role should deploy the dashboard.

For more information on importing and deploying a dashboard, refer to the Working With PeopleSoft Insights spotlight videos.

After you've completed these prerequisites, the imported visualizations and dashboards are available on the Configure Insights Dashboards page.

Note that the prerequisites will remain the same even if the customer is using custom insights.



Embedding insights in WorkCenters is a two-step process.

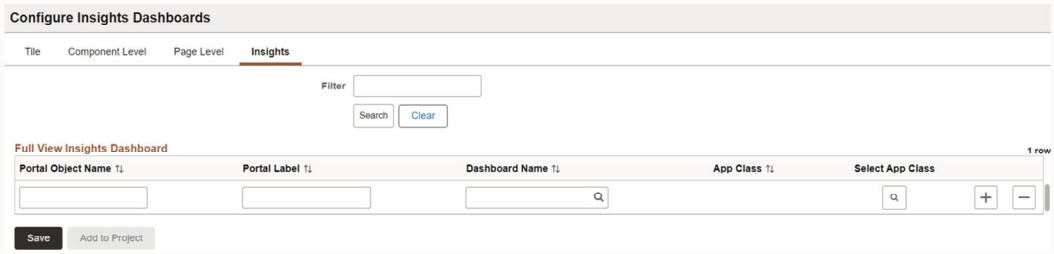
First, you should create a new content reference (CREF) using the Insights tab on the Configure Insights Dashboards page.

Second, associate the newly created Insights CREF with your Fluid WorkCenter using the Configure Pagelets—Links page.
Now, let's discuss these two steps.

Embedding Insights in Fluid WorkCenters (Cont.)

Configure Insights Dashboards page - Insights tab

- The new Insights tab on the Configure Insights Dashboards page enables you to create new content references that can be used within Fluid WorkCenters and Navigation Collections.
- To create content references, you must have the Search Administrator and the Portal Administrator roles.



The first step is to create a content reference.

Use the Menu global search bar to navigate to the "Configure Insights Dashboards" page.

The Insights tab on the Configure Insights Dashboards page enables you to create a content reference that can be used within Fluid WorkCenters and Navigation Collections.

Note that to create content references, you must have the Search Administrator and the Portal Administrator roles.

Now, let's take a closer look at the fields that are available on this page. We'll be using these fields in the demonstration later in this video.

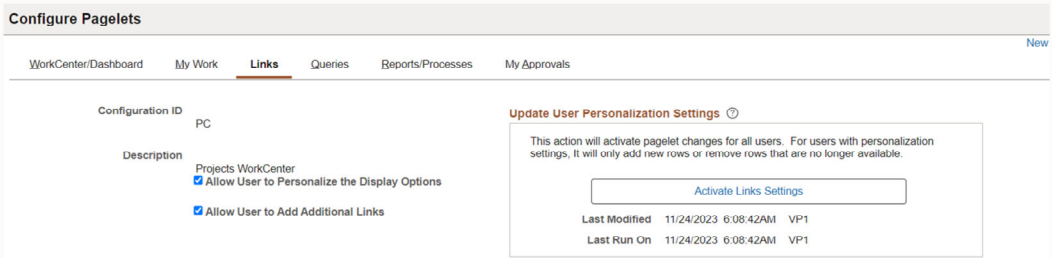
Portal Object Name: The value entered in this field is used to create content reference.
Portal Label: This field allows you to enter a value that will be used to configure fluid WorkCenters. This label is found in the pagelet area of the fluid WorkCenters.
To see the created content reference and portal label, use Menu global search to navigate to Fluid Structure Content, Fluid Pages, and PeopleSoft Applications.
Dashboard Name: Choose the corresponding imported Insights Dashboard from the list.

For more information, refer to the topic “Configuring a Dashboard” in the Search Technology online help.

Embedding Insights in Fluid WorkCenters (Cont.)

Configure Pagelets – Links page

Use the Configure Pagelets – Links page to associate and activate the CREF links for the Insights Dashboards.



Next, you can associate the newly created Insights CREF with your Fluid WorkCenter. Use the Configure Pagelets page to create links and activate the links for the CREF.

Use the Menu global search bar to access the "Configure Pagelets" page.

Let's talk about the fields we'll be using in the demonstration later in the video.

Define Link/Security: Use the Define Link/Security page to define links and external link security as a system administrator.

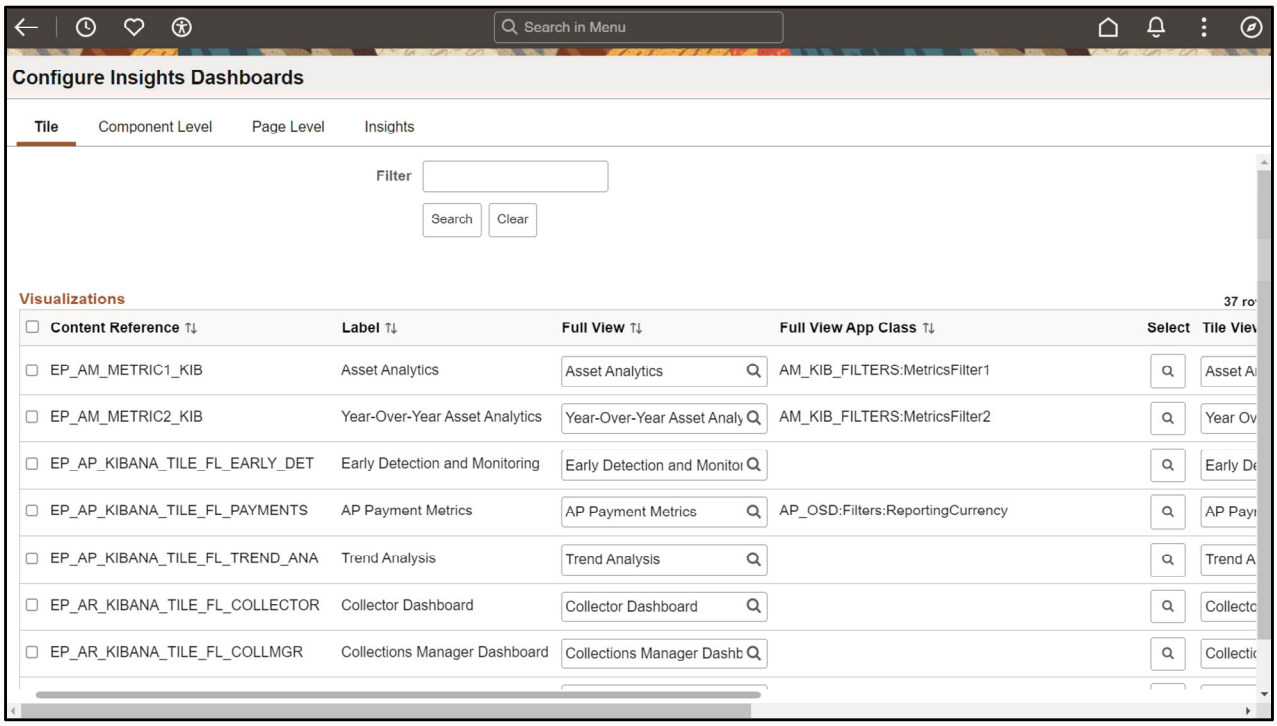
Display Order: This field allows you to enter the order in which you want the links to appear within the group.

Activate Links Settings: This button runs the Application Engine process that adds and deletes changes to the user personalization records and activates the link.

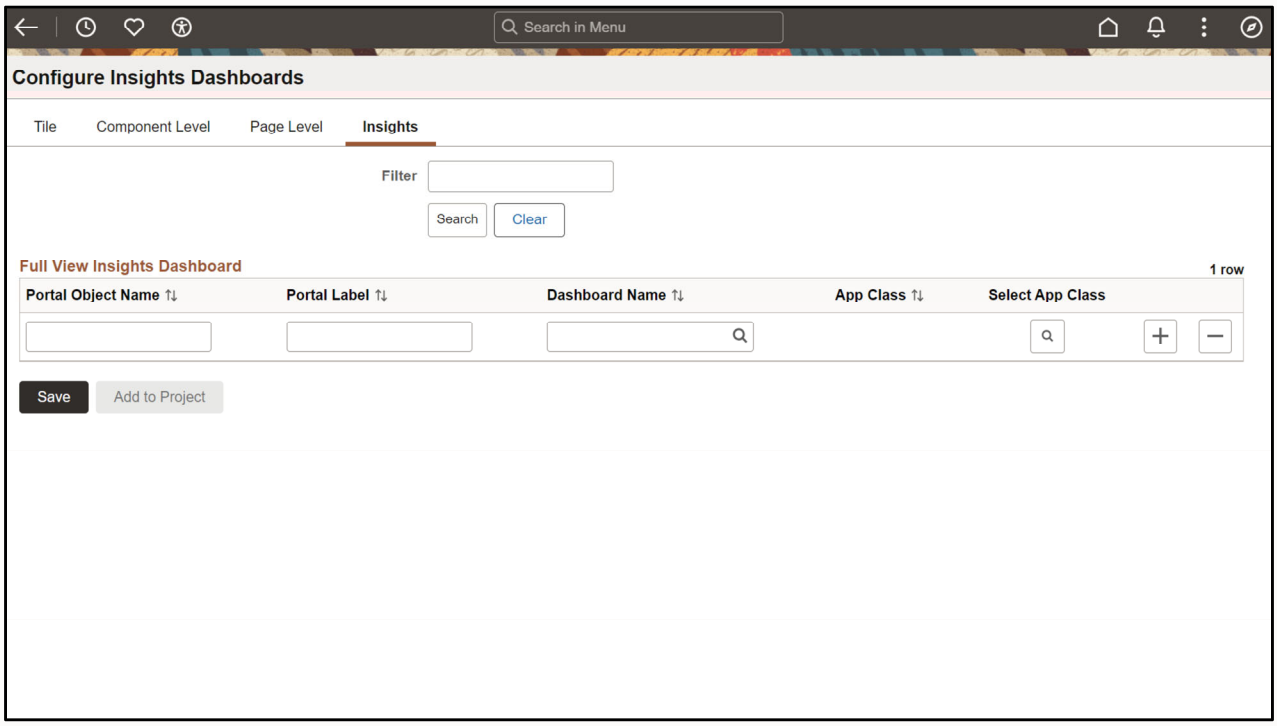
For more information, refer to the topic “Configuring Pagelets” in the PeopleSoft HCM 9.2: Enterprise Components online help.

Later in this video, we'll demonstrate the steps to embed Insights in WorkCenters.

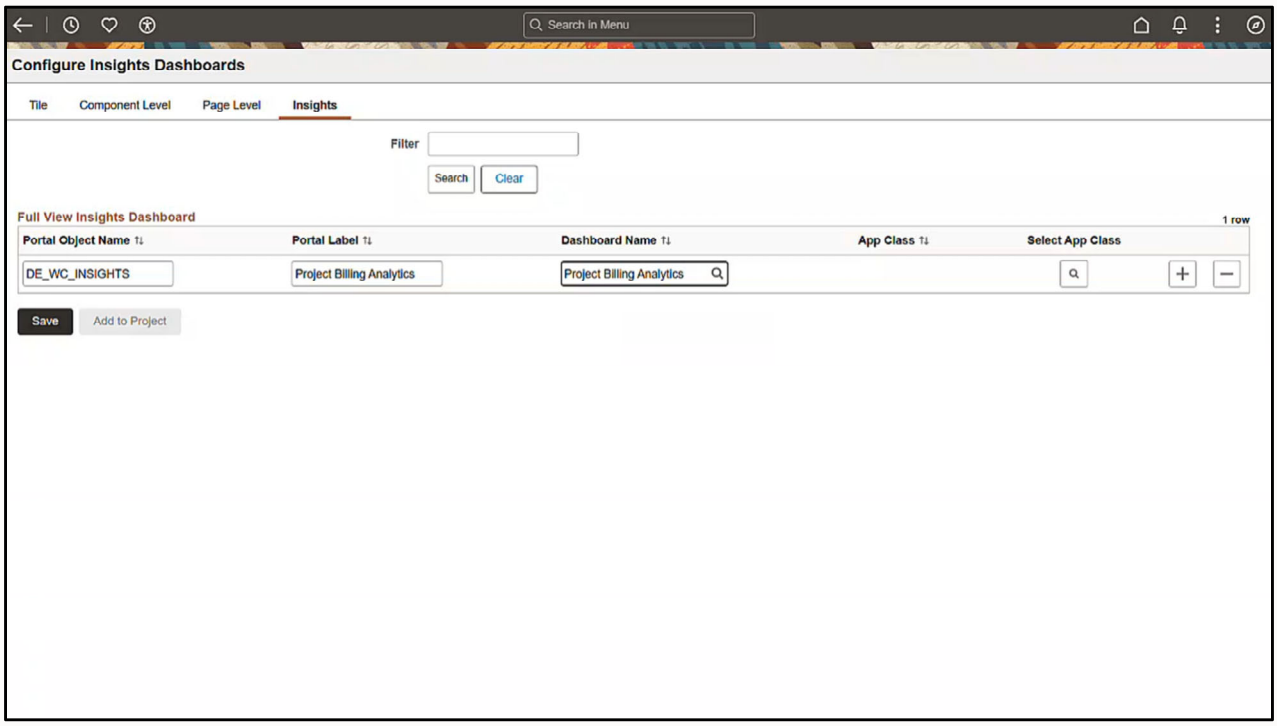
Next, let's have a look at the step-by-step demonstration of Embedding Insights in Fluid WorkCenters.



On the Configure Insights Dashboards page, select the Insights tab to embed an Insights dashboard in fluid WorkCenter pages.

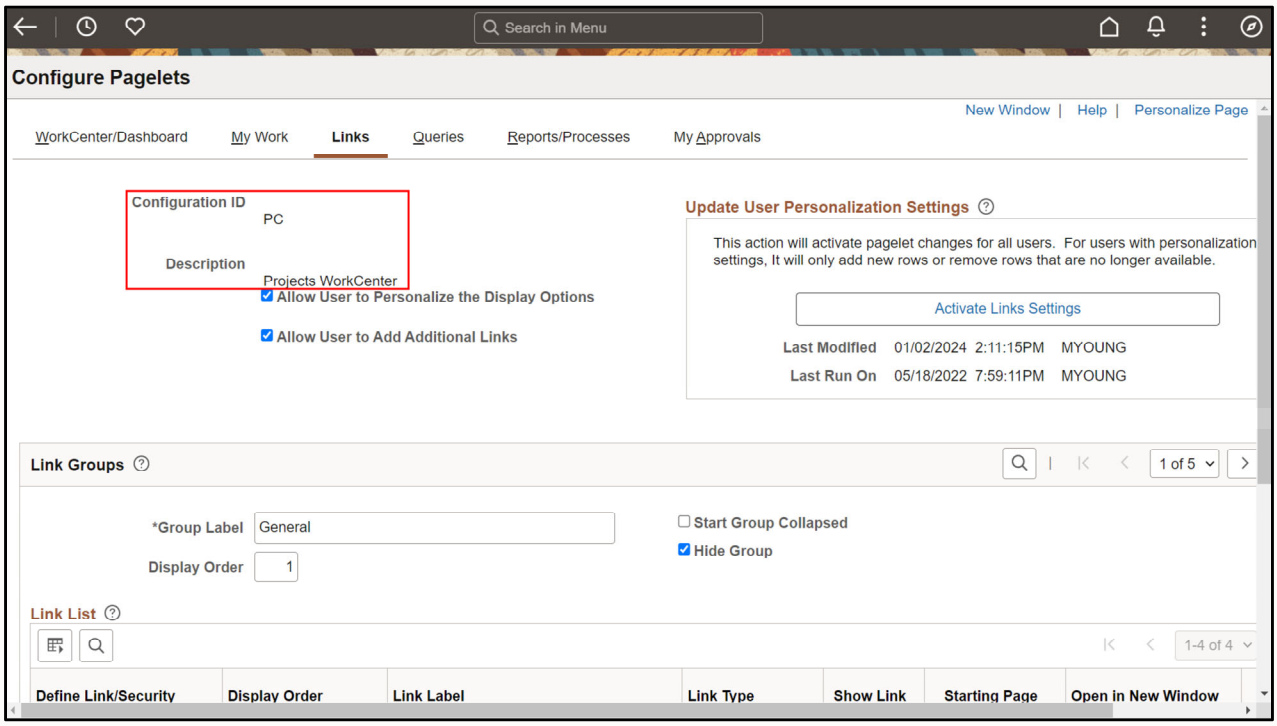


The Insights tab on the Configure Insights Dashboards page allows you to create new content references that can be used within Fluid WorkCenters or in a Nav collections.



For example, create a new CREF by providing the object name, description, and corresponding Insights Dashboard.

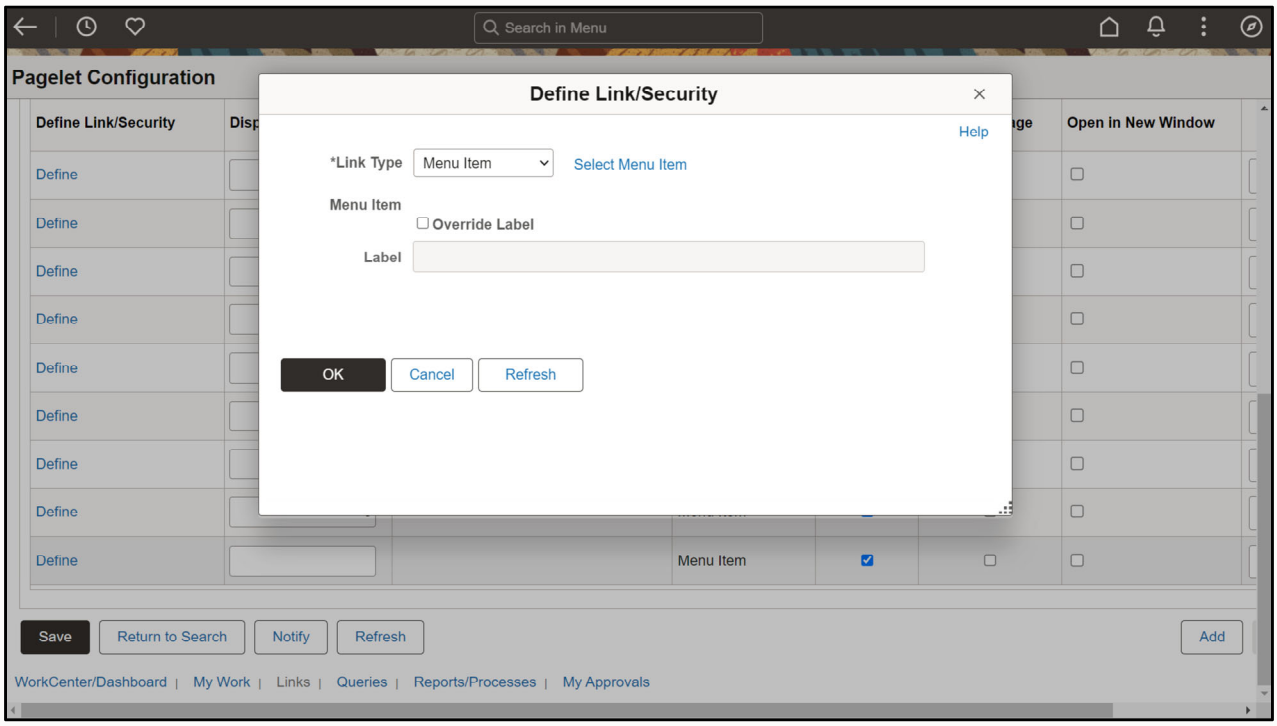
Additionally, you can also filter the data in a visualization based on data from the component buffer. Later in this video, we will highlight this feature while demonstrating how to embed insights into the application page.



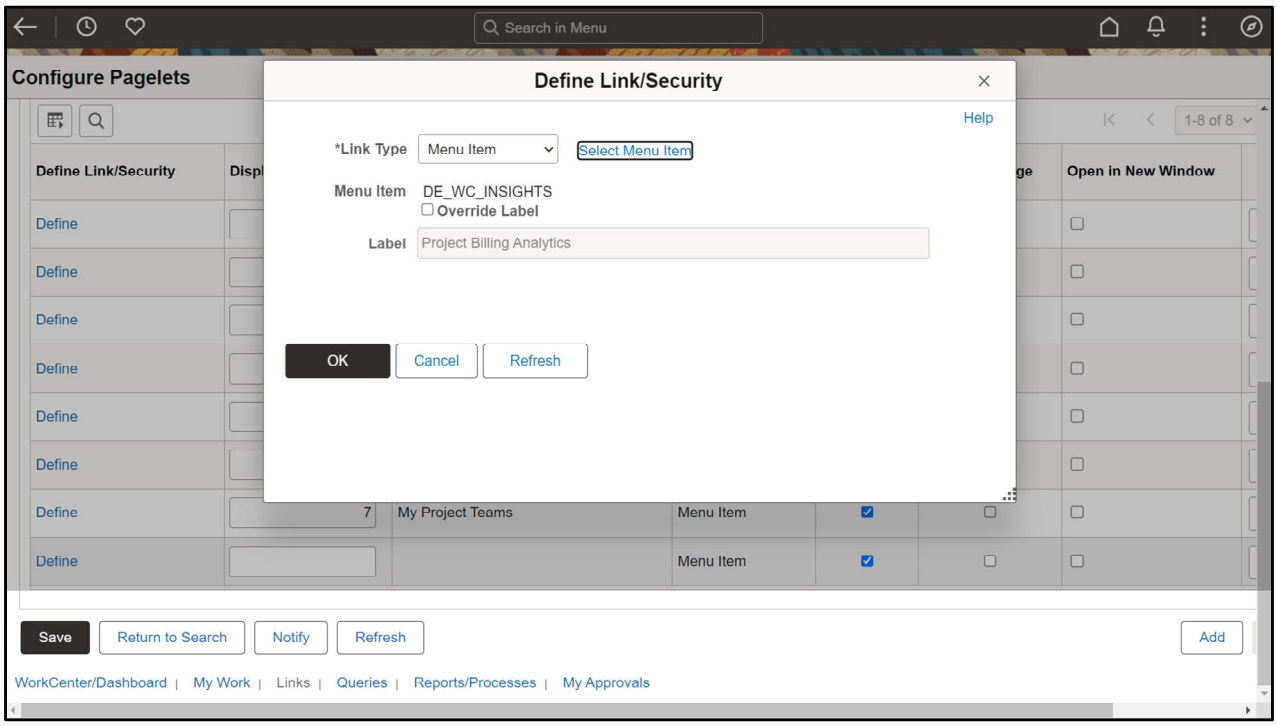
After you save the configuration, you can use the Configure Pagelets page to associate the newly created Insights CREF with your Fluid WorkCenter.

Using Menu global search, navigate to the Configure Pagelets page.

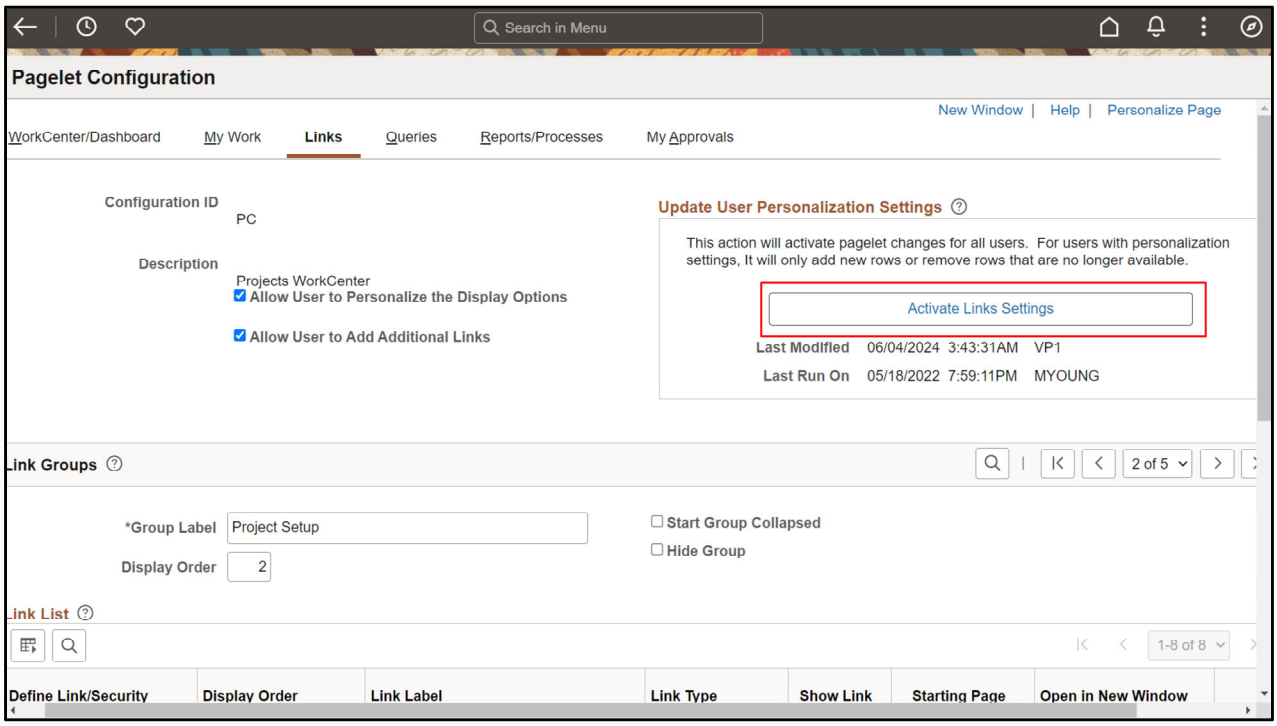
Next, create and activate the CREF links for the Insights Dashboards using the Configure Pagelets—Links page.



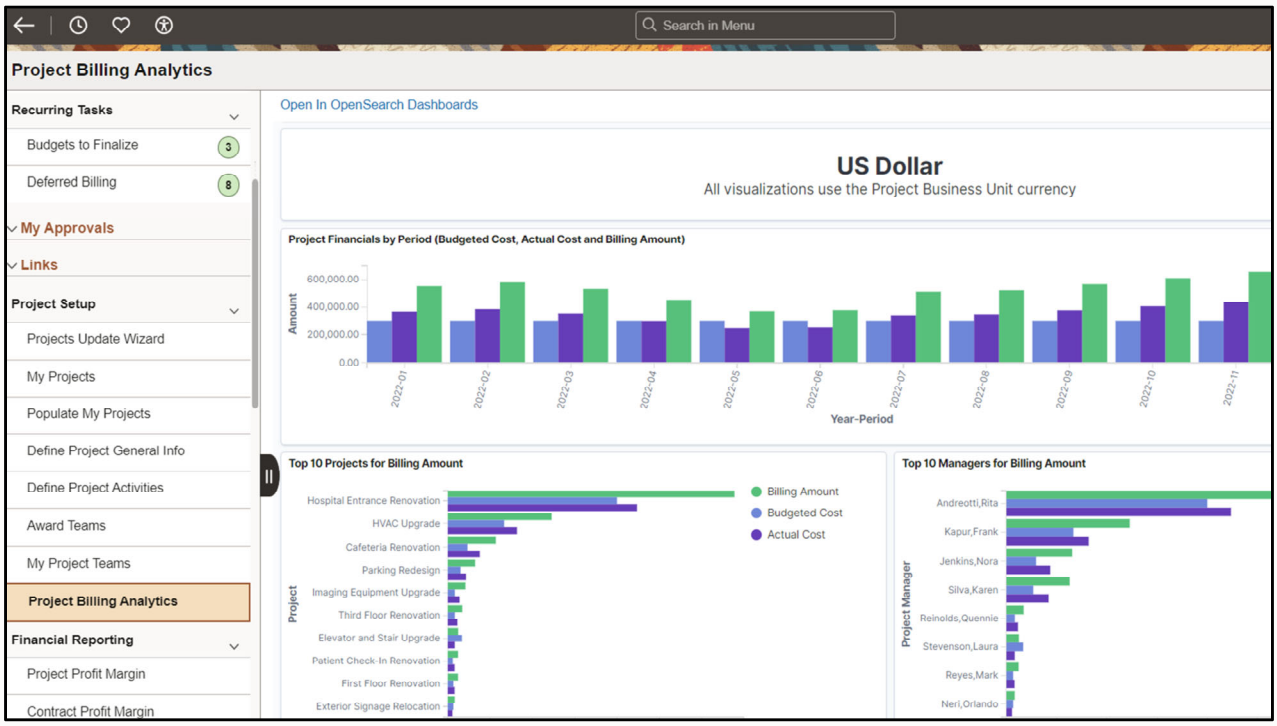
Use the Define Link/Security page to define links and external link security as a system administrator.



Navigate to Fluid Structure Content, Fluid Pages, PeopleSoft Applications, and then select the Project Billing Analytics menu item.



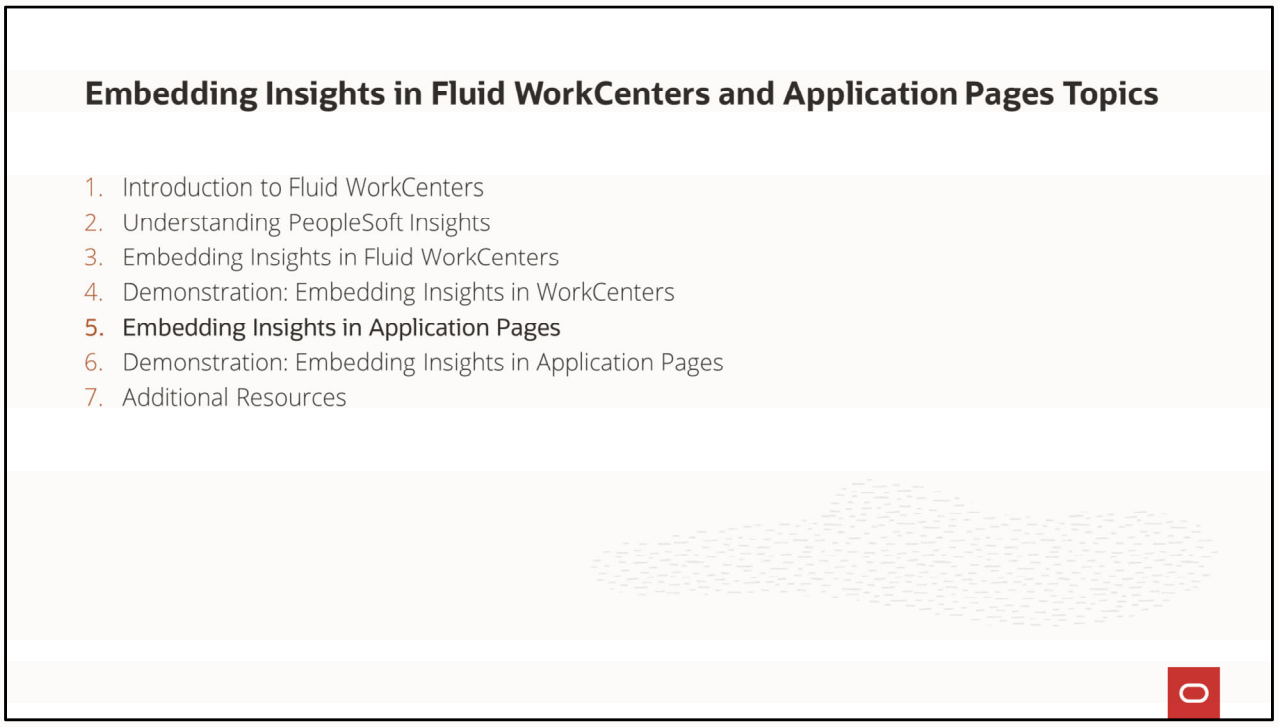
After you add the new CREF, click the Activate Links Settings button to activate the link.



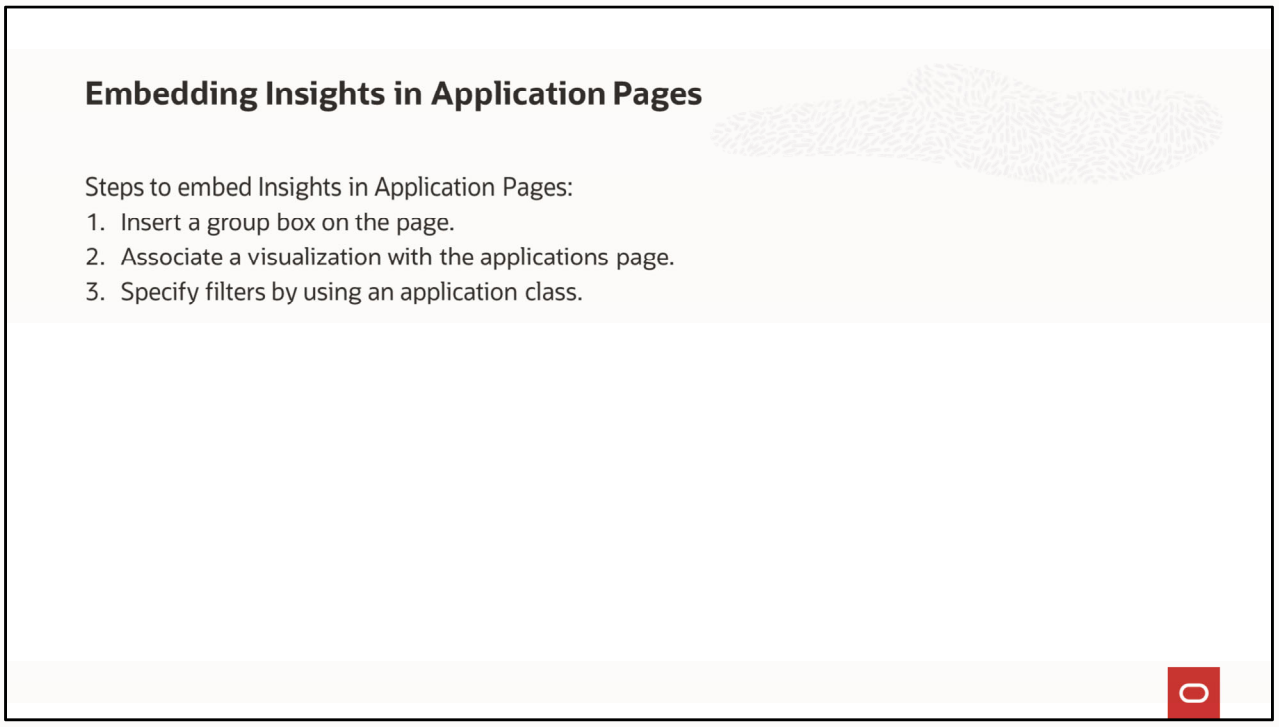
Now, you can access the embedded Insights directly within the context of the Projects WorkCenter.

Select Project Billing Analytics to view the Insights dashboard embedded in the Projects WorkCenter.

This completes the demonstration.



Let's discuss the prerequisites and steps to embed Insights in Application Pages.



PeopleTools enables you to embed one or more PeopleSoft Insights on Fluid pages.

Before you embed Insights in the application page, you must Insert a group box on the page.

Associate PeopleSoft Insights with the applications page using the Page Level tab on the Configure Insights Dashboards page.

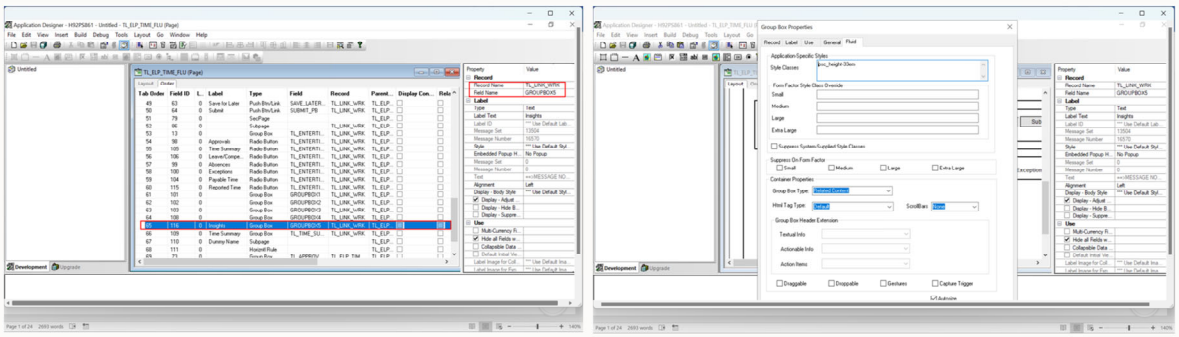
You can also contextually filter the data in a visualization based on context by using an application class. Consider the following examples: employee ID, location, and employee record.

Later in this video, we'll demonstrate the steps that need to be followed to embed Insights in the application page.

Embedding Insights in Application Pages (Cont.)

Insert a group box on a page.

Before you embed a dashboard on the applications page, you need to complete the following steps.



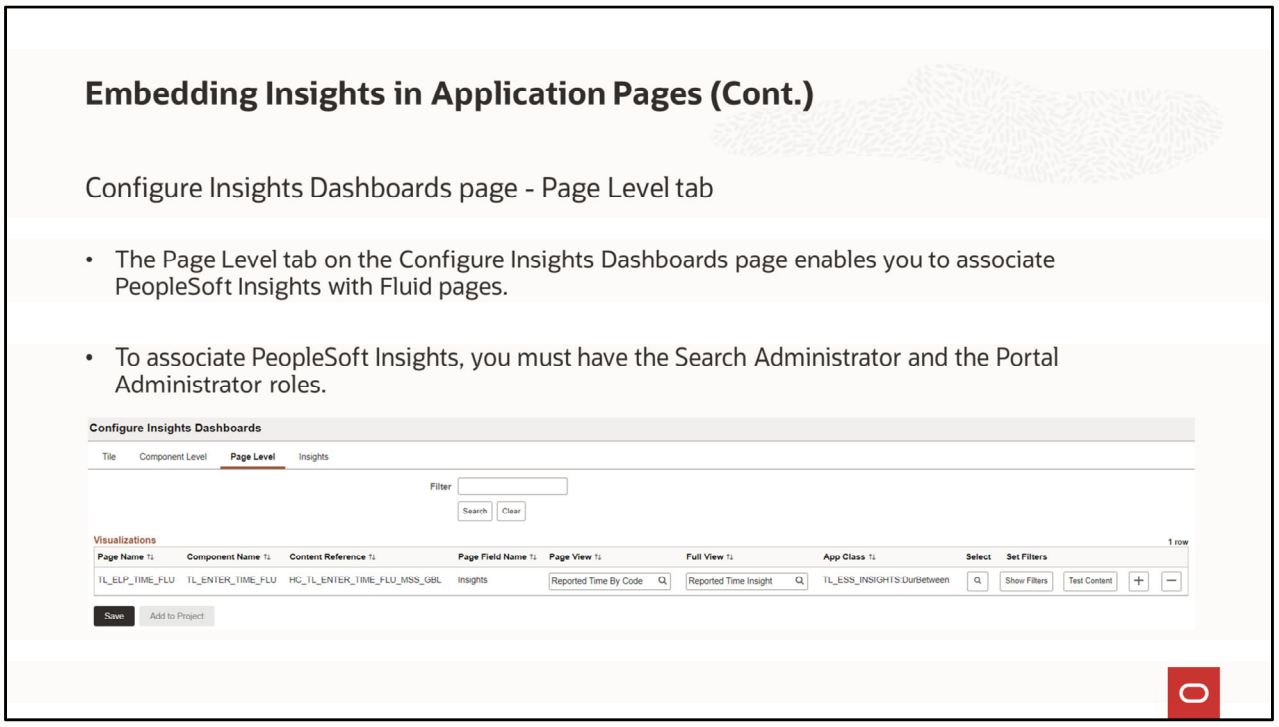
Before you embed a dashboard on the applications page, you need to complete the following steps.

The First step is Insert a group box on the page and provide a page field name.

We will refer to the label of this page field during the configuration in PIA.

On the Fluid tab of the Group Box Properties page, select Related Content as the Group Box Type.

This related content group box will be used to embed the PeopleSoft Insights.

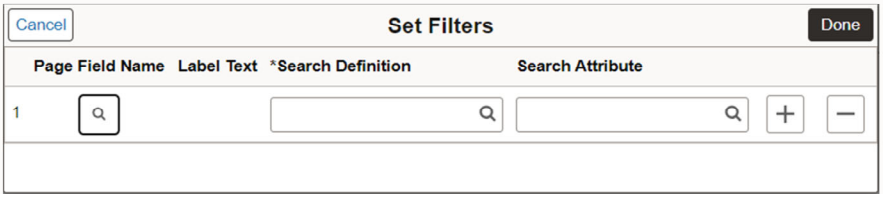


The second step is to associate PeopleSoft Insights with the applications page using the Page Level tab on the Configure Insights Dashboards page.
Use the Menu global search bar to navigate to the "Configure Insights Dashboards" page.
The Page Level tab on the Configure Insights Dashboards page enables you to associate PeopleSoft Insights with Fluid pages.
Let's discuss the field we'll be using in the demonstration later in the video.
Page Name: Choose the page on which you want to embed a dashboard. You've added a group box and specified a page field name on this page.
Component Name: Choose the component name associated with the selected page.
Content Reference: Choose the content reference name associated with the selected component.
Page Field Name: Choose the page field name associated with the ERC group box.
Page View: You can choose an imported dashboard to embed as a page view, the dashboard is displayed on loading of the applications page.
Full View: Choose an imported dashboard from the list. You may embed a dashboard with multiple visualizations for full view. Note that this is a mandatory field.
App Class: This field displays the selected application class, which contains PeopleCode to apply filters based on context and display visualization data accordingly**.**
If you do not specify an application class to filter data, OpenSearch Dashboards displays the default visualization data.
Set Filters: Click to launch the Set Filters page to apply additional filters apart from the time range.
Test Content: This button enables you to preview the dashboard in the applications page.
For more information, refer to the topic “Configuring a Dashboard” in the Search Technology online help.
Note that to associate PeopleSoft Insights, you must have the Search Administrator and the Portal Administrator roles.

Embedding Insights in Application Pages (Cont.)

Specifying filters

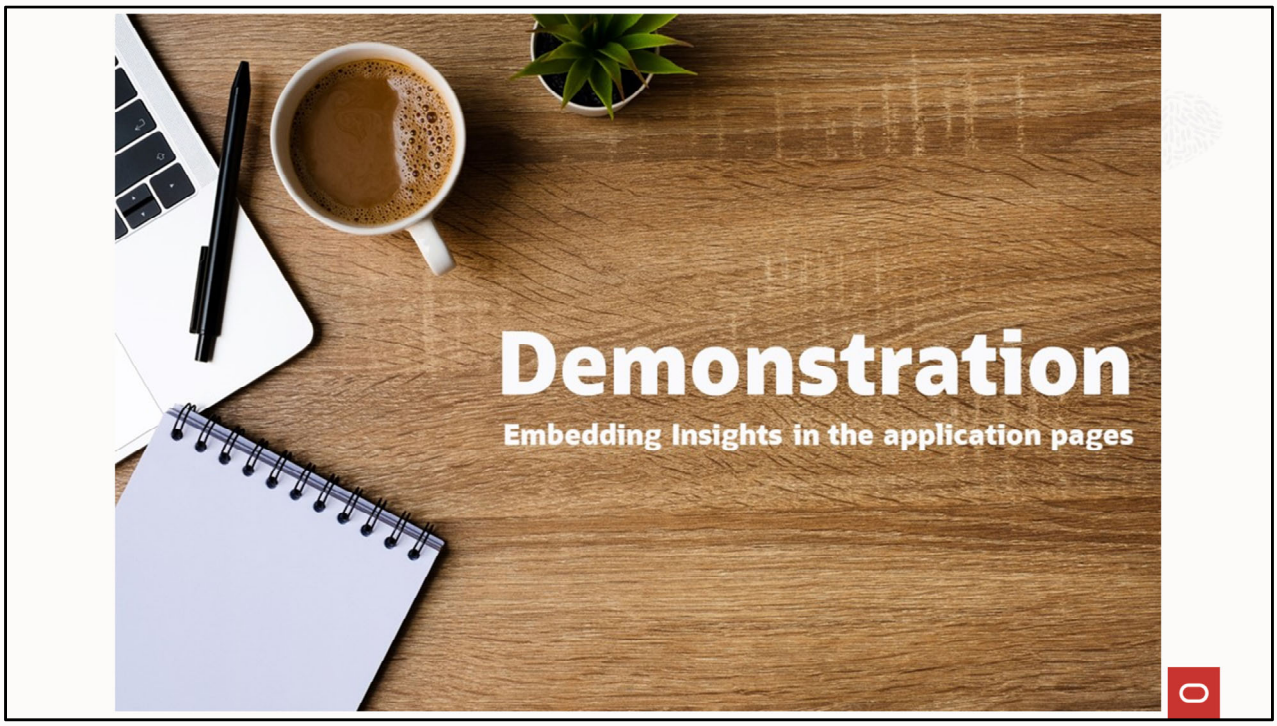
- PeopleSoft provides you the flexibility to filter the data in a visualization based on data from the Component Buffer.
- Set Filters can be configured for a maximum of three page field values.



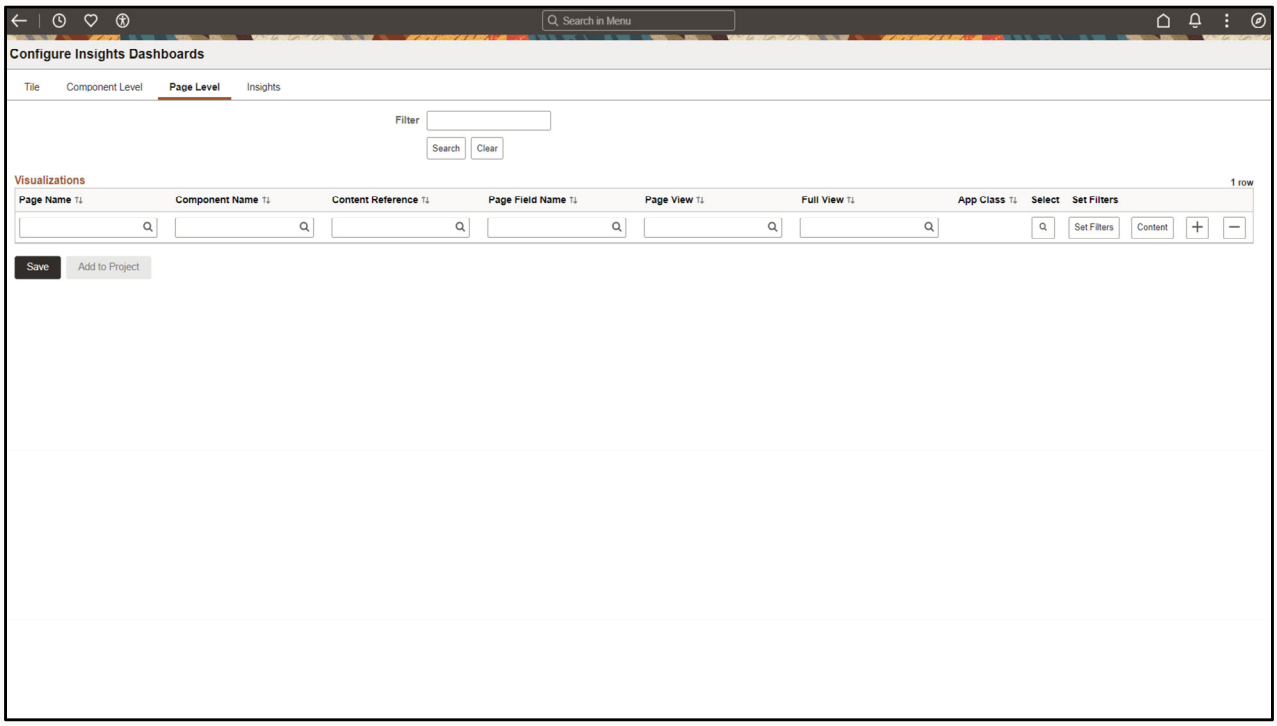
The Set Filters page allows you to pass contextual data from the Component Buffer as filters to the visualization.

Access the Set Filters page by selecting the Set Filters button on the row.

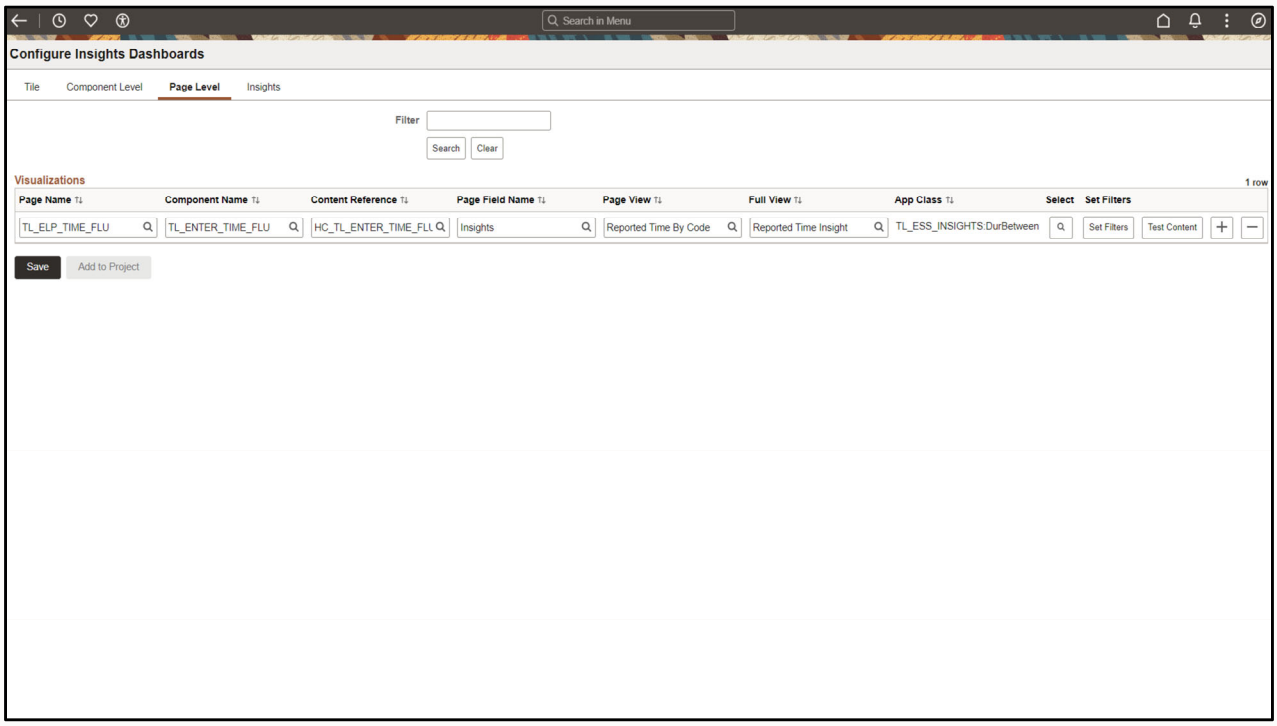
Note that the Set Filters can be configured for a maximum of three page field values.



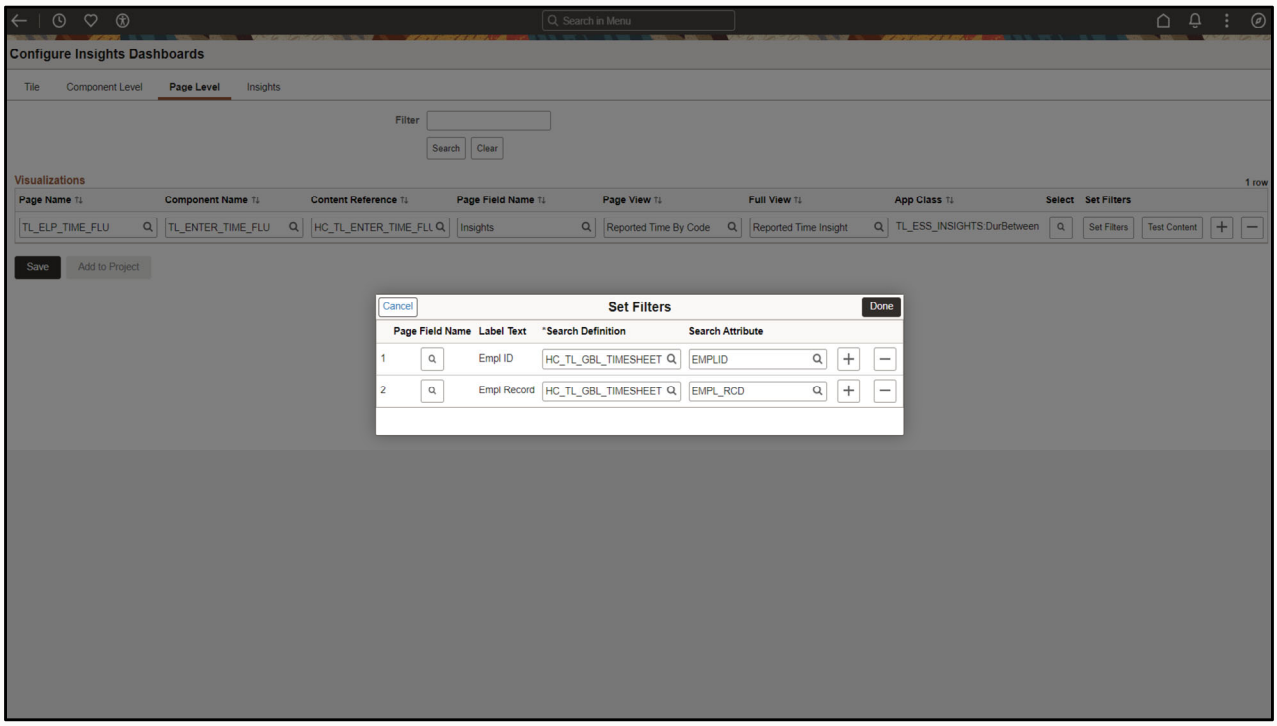
Next, let's take a look at the step by step demonstration of Embedding Insights in application pages and render the dashboard data using the context filter capabilities based on your requirement.



On the Configure Insights Dashboards – Page Level tab, you can specify a dashboard that can be used on the applications page.



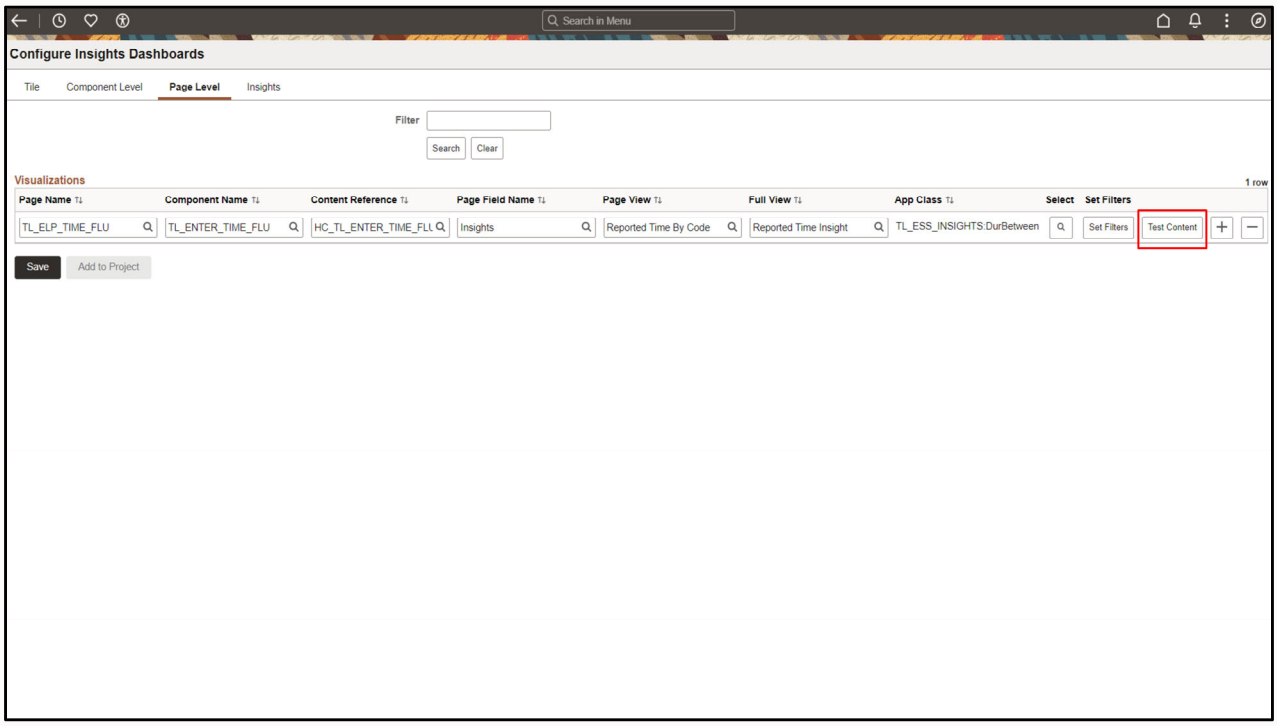
For example, you can embed a dashboard directly on the application page by providing the Page Name, Component Name, Content Reference, Page Field Name, Page View, and Full View.



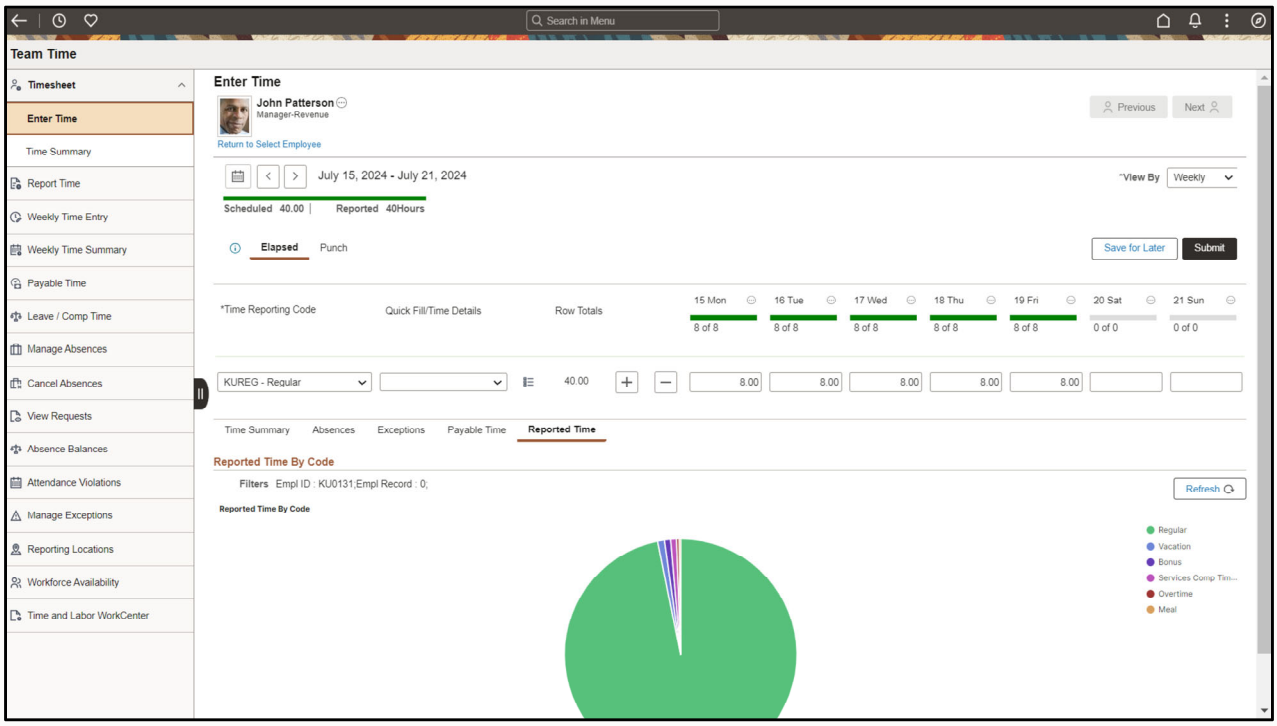
You can access the Set Filters page by selecting the Set Filters button on the row to filter the data in a visualization based on data from the Component Buffer.

To demonstrate, we will apply filters based on Empl ID and Empl Record.

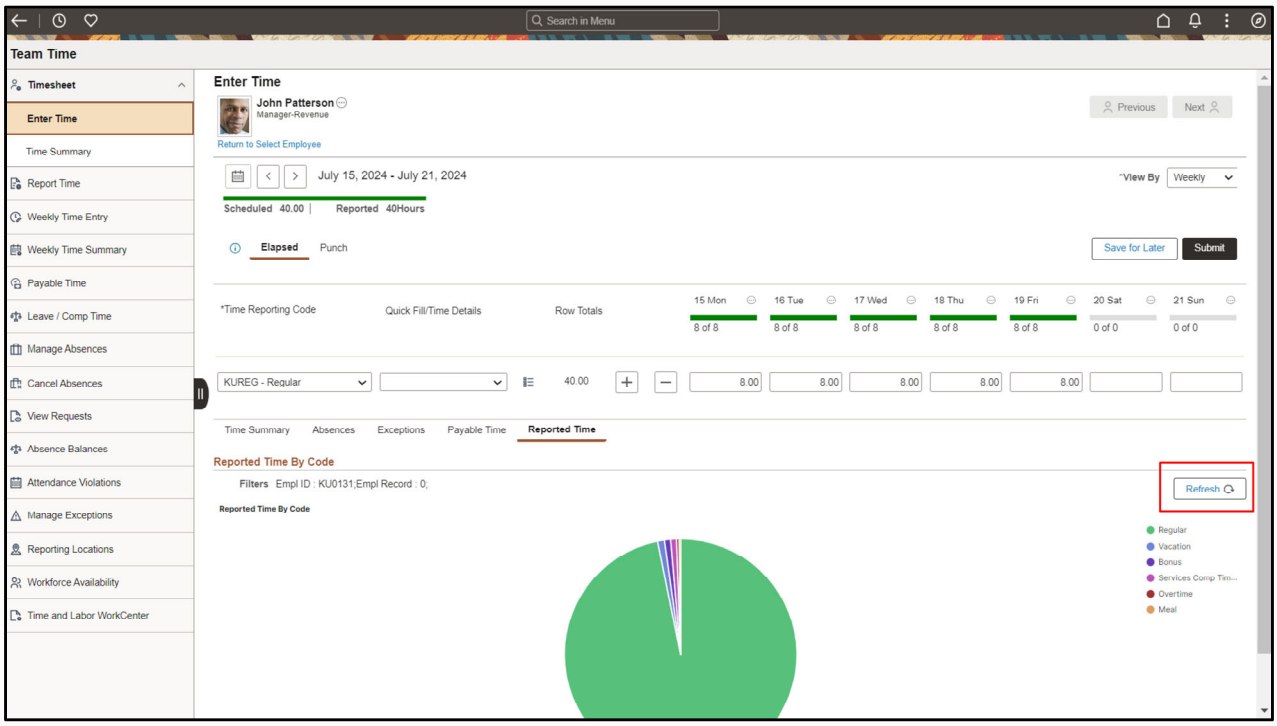
Note that you can configure the Set Filters for a maximum of three page field values.



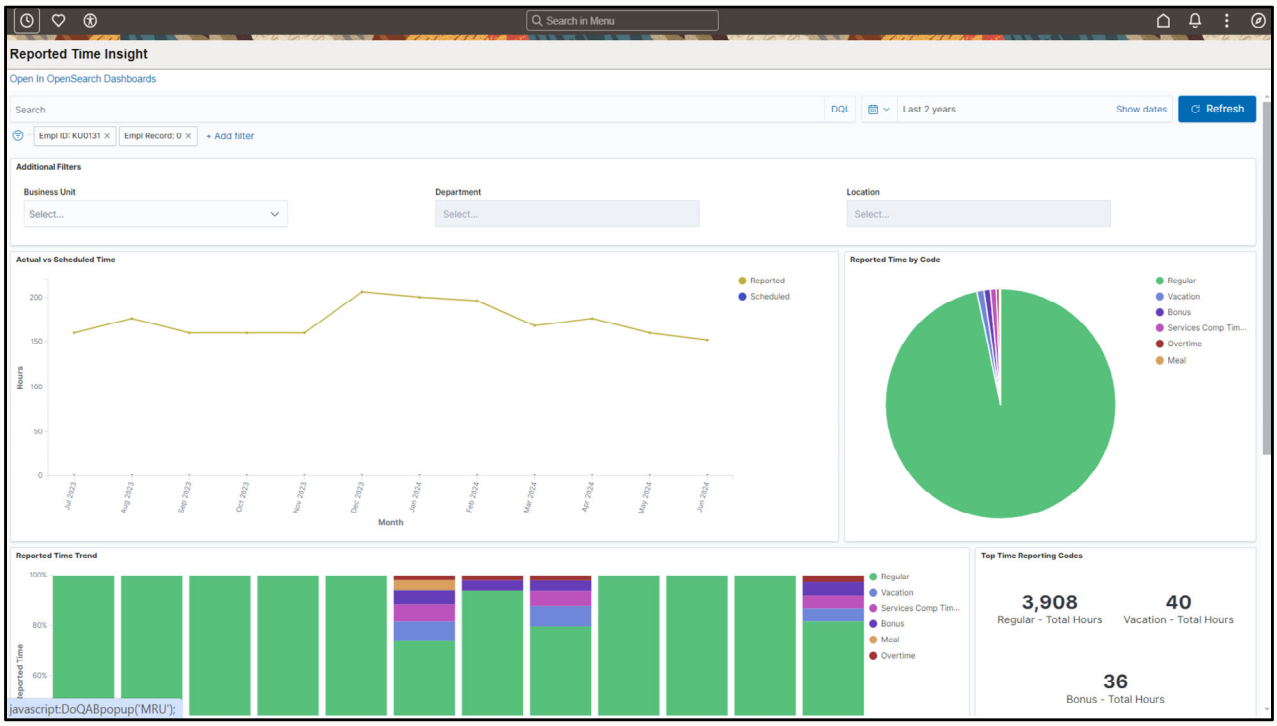
Once you save, select the Test Content button to test the embedding of the dashboard.



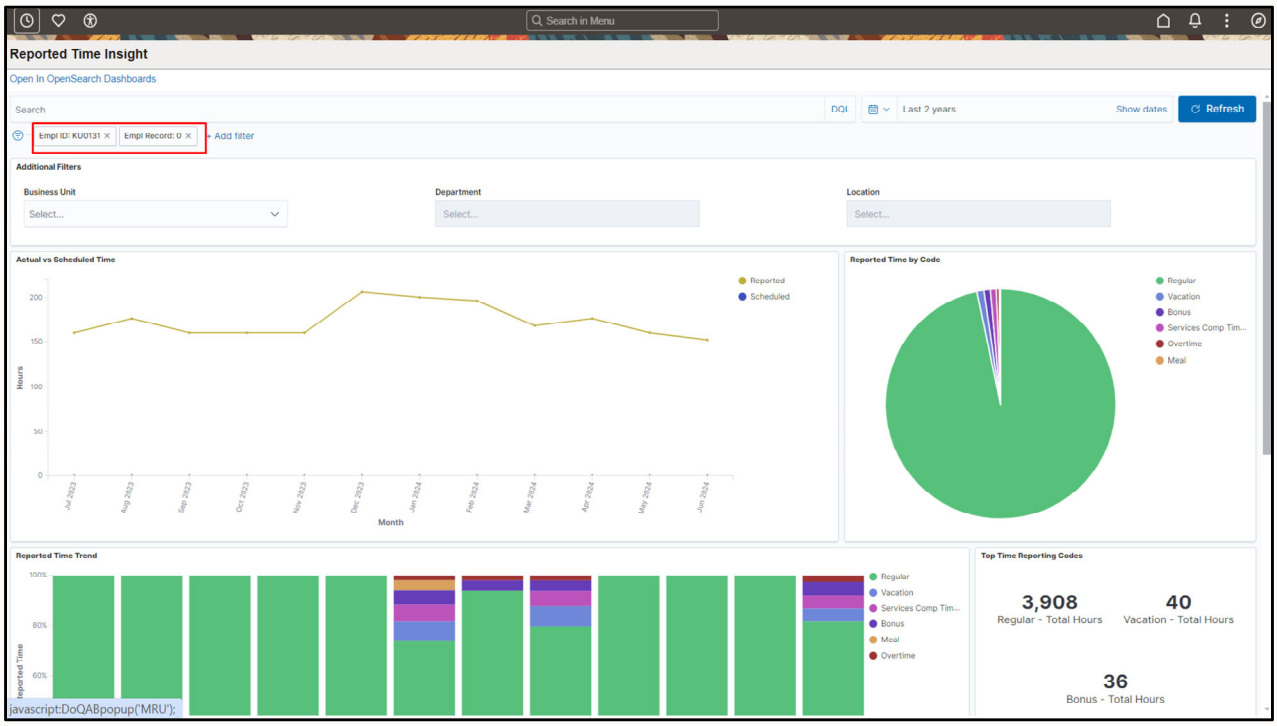
After you embed the dashboard, as a user, you can easily access and view the embedded dashboard within the context of the application page.



You can refresh the visualization based on the filter values applied at runtime using the Refresh button.



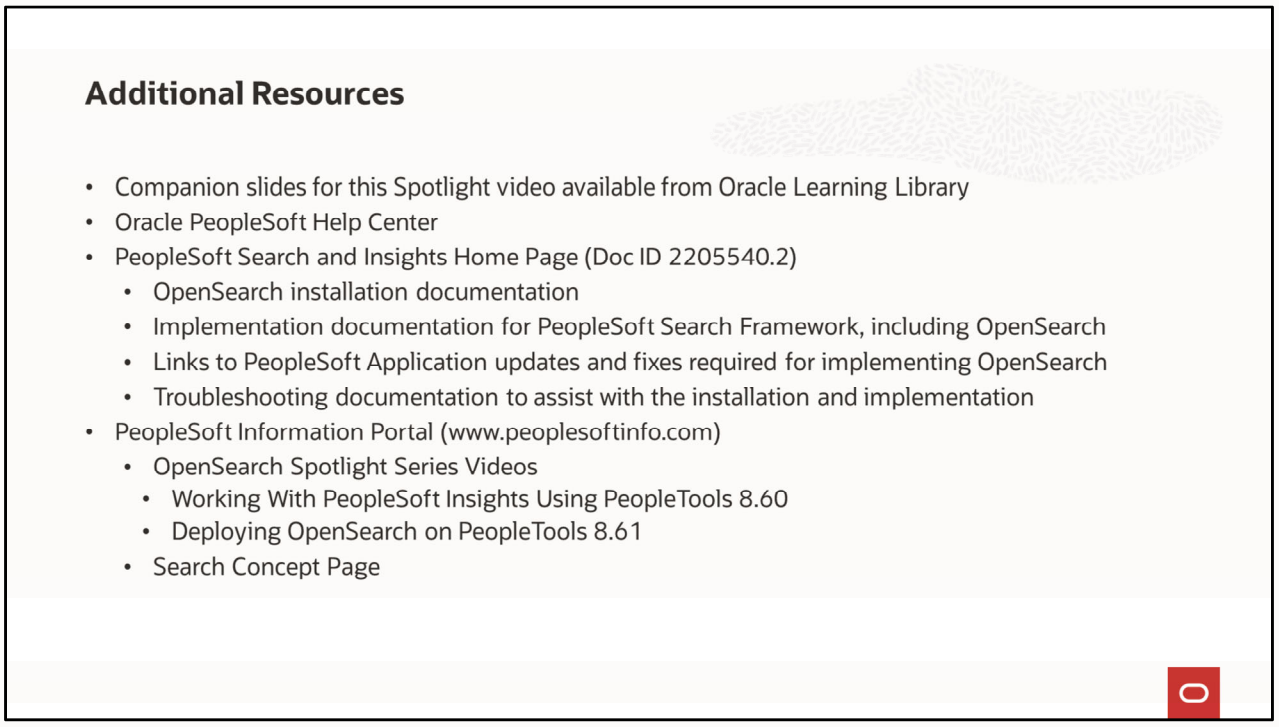
When you click the tile view visualization, a full view dashboard appears in the new window.



You can also view the applied filters in your visualization.

You can also view the applied filters in your visualization.

Before we complete this session, let's have a look at the various sources of additional information available.



You can download the Companion Slides, with images and notes from this video, from the Oracle Learning Library.
The Oracle Help Center for PeopleSoft includes the most recent online help, installation and upgrade guides, and links to other PeopleSoft portals, for all PeopleSoft product lines.
The PeopleSoft Search and Insights Home Page includes installation documentation and implementation documentation for PeopleSoft Search Framework, including OpenSearch, and contains links to troubleshooting documentation to assist with the installation and implementation.
On the PeopleSoft Information Portal (peoplesoftinfo.com), you can find OpenSearch Spotlight Series videos and PeopleSoft Insights Concept page that contain information about how to use OpenSearch Dashboards in PeopleSoft.

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