

ORACLE

New Features of the PeopleSoft Analytic Landscape

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Safe Harbor

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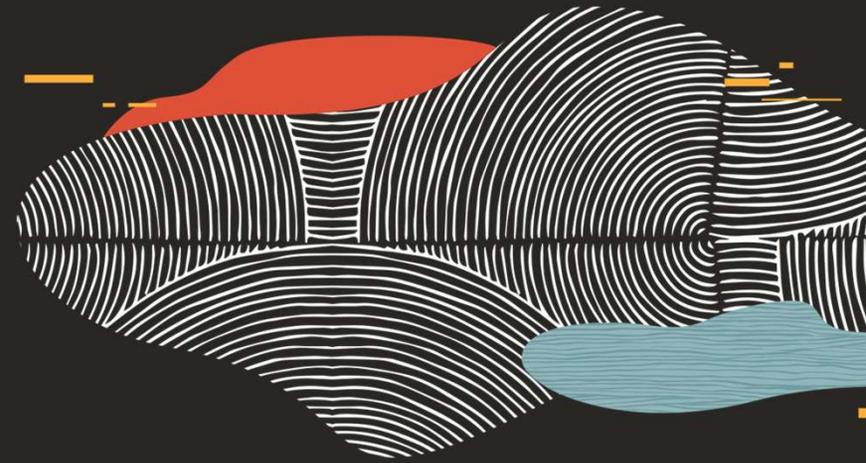
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Agenda

- Key Initiatives
- Personalized Analytic Notifications
- Kibana with PeopleSoft
- Resources

Our Goal

Inform customers about powerful new analytic capabilities, and demonstrate how analytics can be used to transform how users work.

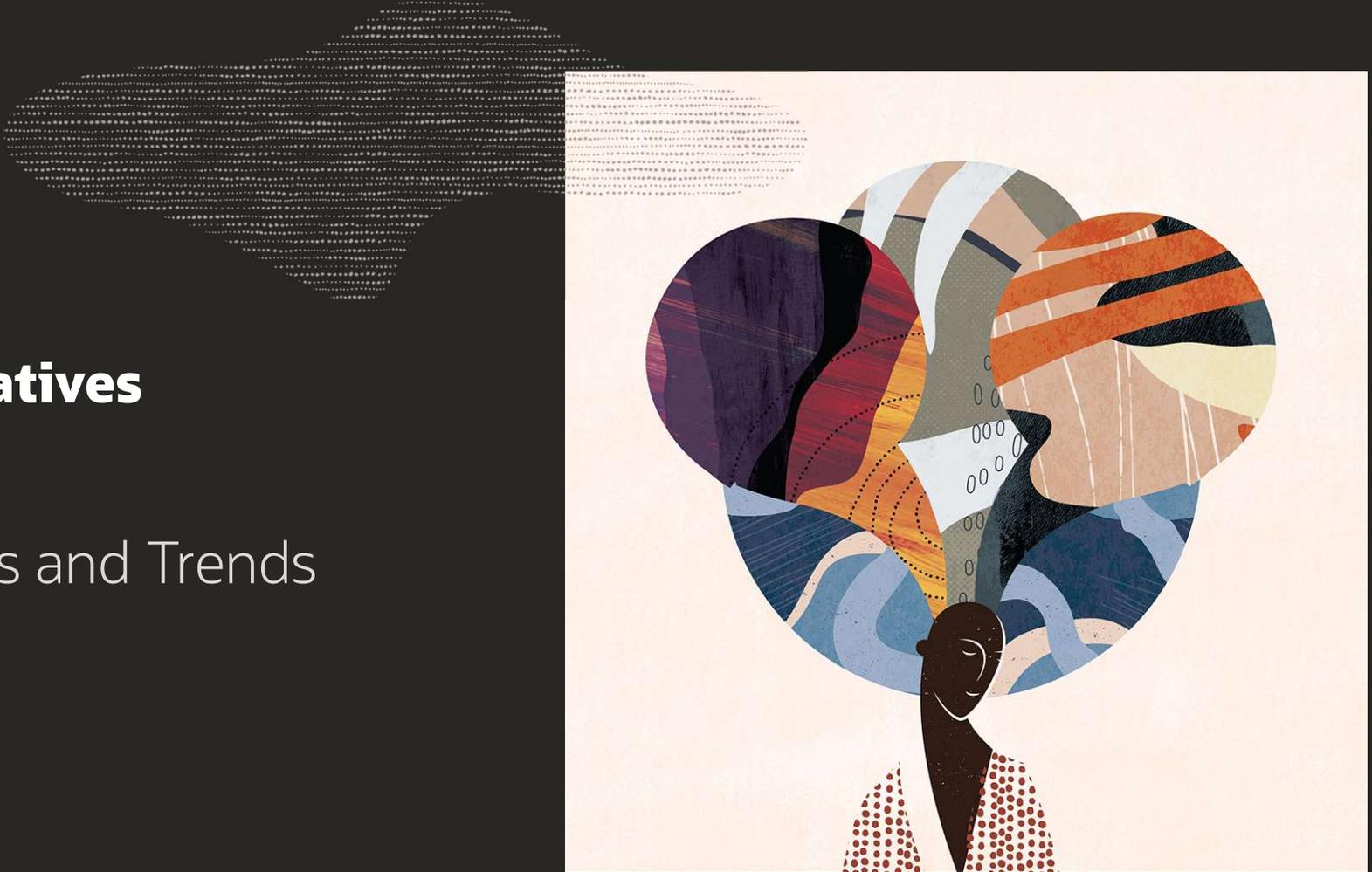


Why this matters

Improves visualization and understanding of information, provides better decision support, transforms business rule insight and adherence.

Key Initiatives

New Tools and Trends



Key PeopleSoft Initiatives

Analytics and Insight



Relevant information,
Put the system to work

Optimized User Experience



Focus on the user

Reusable Frameworks



Powerful leverage

Personalized Analytic Notifications

What They Are
Why They Are Valuable



Personalized Analytic Notifications

- Set thresholds in Pivot Grids
- System alerts users to conditions that need attention—when criteria are met
- Personalize thresholds from the pivot grid viewer
- Notify via email or alerts

The screenshot displays the Oracle HR Self-Service interface. The main window shows 'My Team' with a 'Headcount Movement' dashboard. A 'Team Performance Status Data' dashboard is overlaid, showing a bar chart with a red threshold line. A 'Threshold Personalization' dialog box is open, allowing users to configure alerts for specific columns.

Columns	Threshold Type	Threshold Value	Lower Limit	Higher Limit	Color	Threshold Criteria	Alert Type	Recurrence Name
Employee ID							None	

Changes the Way Users Interact with System!

Pivot Grid Threshold Framework

Available Values

- Range
 - Above Range
 - Below Range
 - In Range
 - Out of Range
- Distinct
 - Equal
 - Not Equal
 - Greater Than
 - Less Than

Set in Pivot Grid Wizard

Notification Type

- Push Alert
- Mail
- Both
- None (user choice)

Notification List (users and roles)

Evaluated at Process Schedule Request

Configure Thresholds

Data Source Column: Inv Amt
Threshold Type: Distinct
Threshold Value: 500000
Threshold Color: Red
Threshold Description: Grade 2

Notification
Notification Condition: Greater Than
Alert Type: Alert

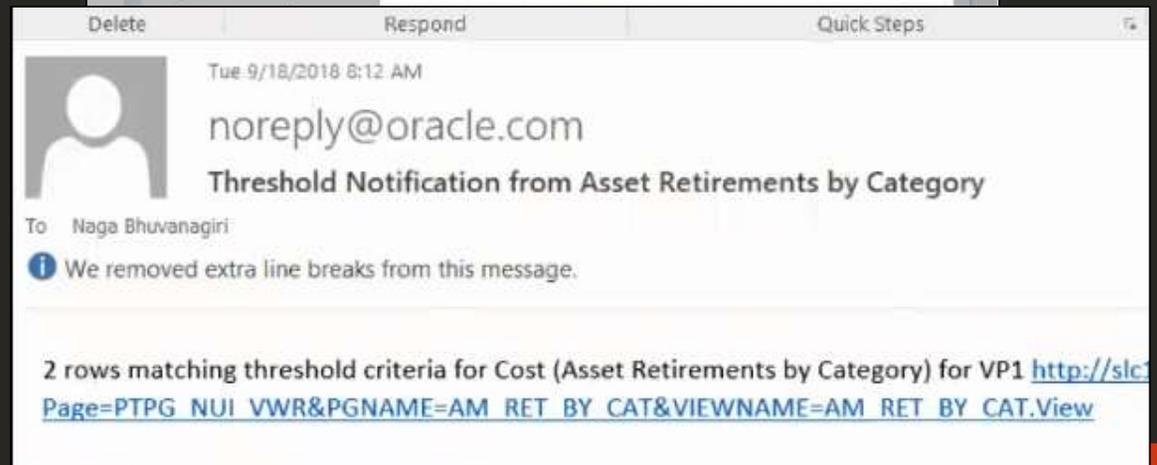
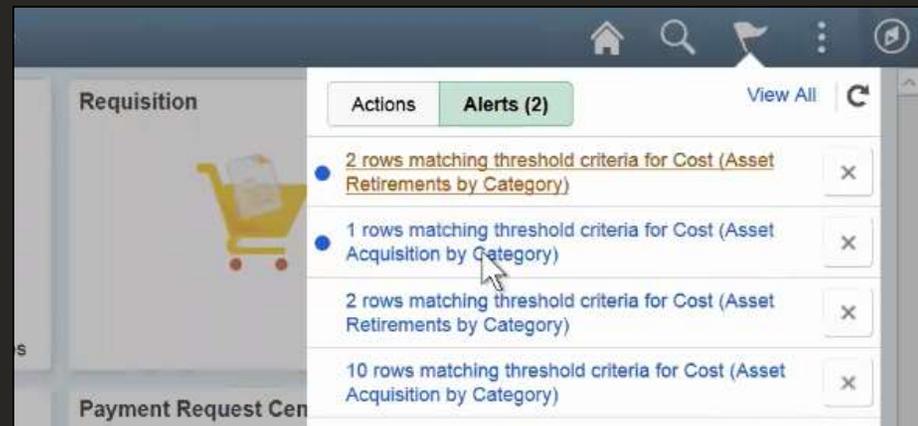
Notify List

Type	User		
1 User	VP2	+	-
2 Role	Consultant	+	-

OK Cancel Return

Notifications of Threshold Violations

- User receives one message for all violations of thresholds on the pivot grid model
- Clicking the notification takes the user to the pivot grid where they can see the violation
- Admin set notification frequency
- Text Notifications (planned)



The Value of Thresholds and Notifications



Captures and enforces important business rules



Easy to set up for administrators and easy to use for end users



Users don't need to be logged in to PeopleSoft to be notified



Uses existing analytic frameworks

Configuration—Key Points

- The Pivot Grid model generally should have the threshold personalization enabled
- The user is then allowed to subscribe to notifications or be a part of the notification list
- The Pivot Grid model should be added to the notification list by mapping it with a recurrence

Display Options

- View Grid
- Export Data
- Chart Options
- Hide Chart
- Reset
- Save
- Bar Chart
- Line Chart
- Pie Chart
- Horizontal Bar Chart
- Threshold Options
- Allow User Addition
- Update Filters
- Show Help
- Save As

- View Grid
- Update Filters
- Chart Options
- Export Data
- Threshold Options
- Reset
- Save

Cancel

Threshold Personalization

Apply

1 row

Columns	Threshold Type	Threshold Value	Lower Limit	Higher Limit	Color	Alert Criteria	Alert Type	Recurrence Name
Cost	Distinct	40000			Red	Greater Than	Push	Daily





On The Horizon



Personalized Analytic Notifications

Personalized Analytic Notifications

- Threshold settings and notifications at individual Data point level
- Threshold visualization for Dual Y-Axis charts
- Notification options are set at System level with Personalization enabled
- Notification options at system level or user level apply for the Personalized Analytic Notifications
- Administrator may chose a list of users to be subscribed or leave it open for all users to subscribe

Individual Data Point Thresholds

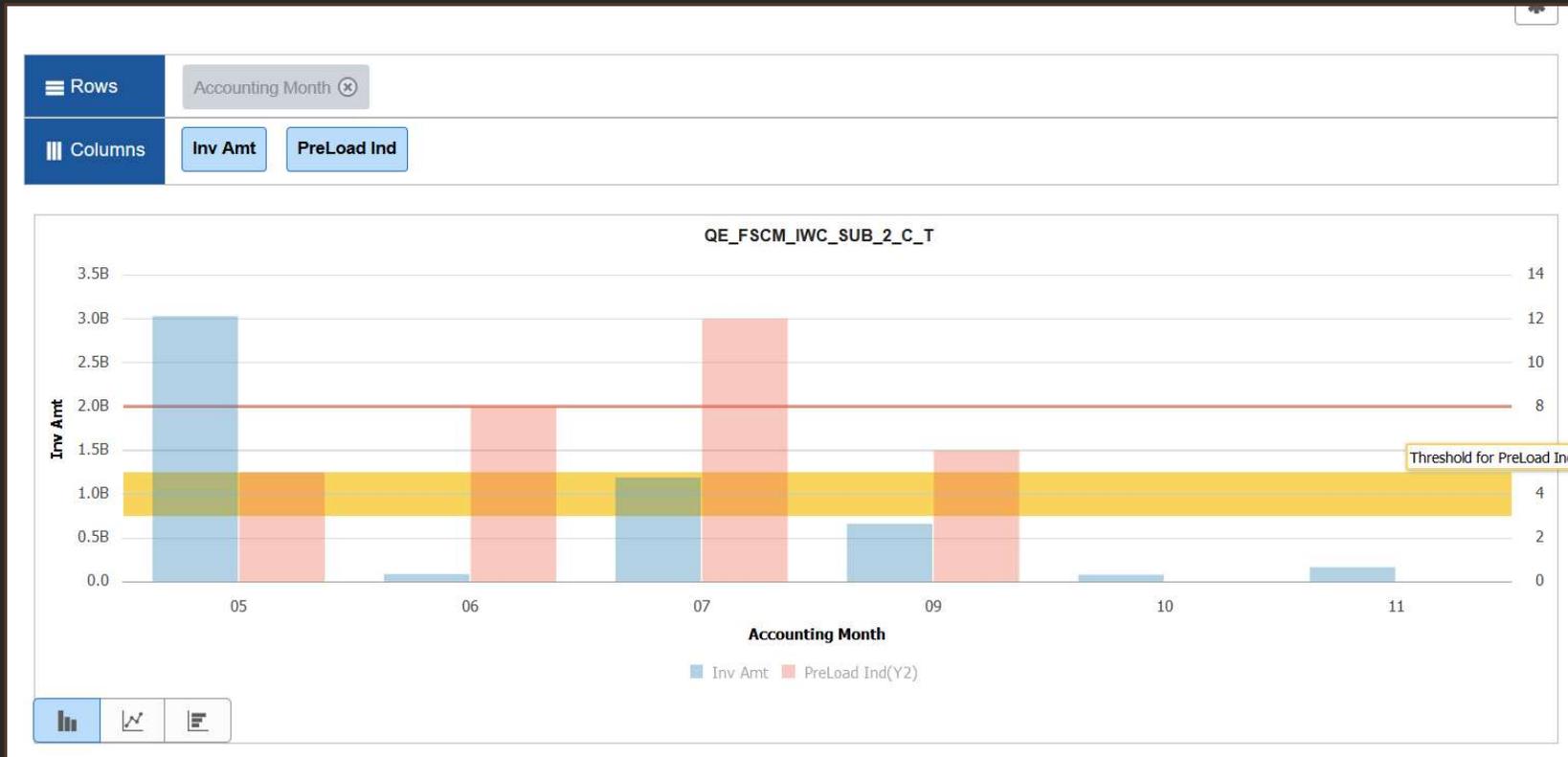
The screenshot displays a data visualization interface with a bar chart showing 'Inv Amt' (Y-axis, 0.0 to 3.5B) across 'Accounting Month' (X-axis, 05, 06, 07). The bar for month 05 is significantly higher than the others. An 'Actions' menu is open over the bar for month 05, with 'Configure Notifications' highlighted. A 'Configure Notifications' dialog box is overlaid on the right, showing settings for 'Inv Amt' with a threshold value of 1500000000 and alert criteria of 'Greater Than'.

Accounting Month	Inv Amt
05	~3.0B
06	~0.1B
07	~1.2B

Configure Notifications

- Sort Options: Inv Amt
- Accounting Month: 05
- Threshold Type: Distinct
- Threshold Value: 1500000000
- Alert Criteria: Greater Than
- Alert Type: Push
- Apply To All: N

Dual Thresholds



Notification Configuration

< Notification Configuration Notification Configuration

Notification Name Pivot Grid Thresholds

*Event Name

Description

Functional Category

Object Owner ID

Mandatory Notification No

Notification Options 3 rows

Notification Type <input type="button" value="v"/>	Available <input type="button" value="v"/>	Enable By Default <input type="button" value="v"/>
Push	<input type="radio"/> Yes	<input type="radio"/> Yes
Email	<input type="radio"/> Yes	<input type="radio"/> No
Text	<input type="radio"/> Yes	<input type="radio"/> No

Personalization Settings

Allow Personalization Yes

Authorize Roles and Permission Lists 1 row

Type of Authorization <input type="button" value="v"/>	Name <input type="button" value="v"/>	
1 <input type="text" value="Role Name"/> <input type="button" value="v"/>	<input type="text" value="PeopleSoft User"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Administrator's View
(will change!)

Notification Preferences

My Preferences Home Notifications More Close

Notification Window

Save

Display Settings

Notification Items to display

Notification List 4 rows

Notification Name	Description	Notification Window	Email Notification	Text Message
1 Absence	Absence Notification	<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> No
2 Pivot Grid Thresholds	Personalized Analytic Not	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> No
3 Test	Test	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
4 HR Notification	HR Notifications	Yes		Yes

User's View
(Will Change!)

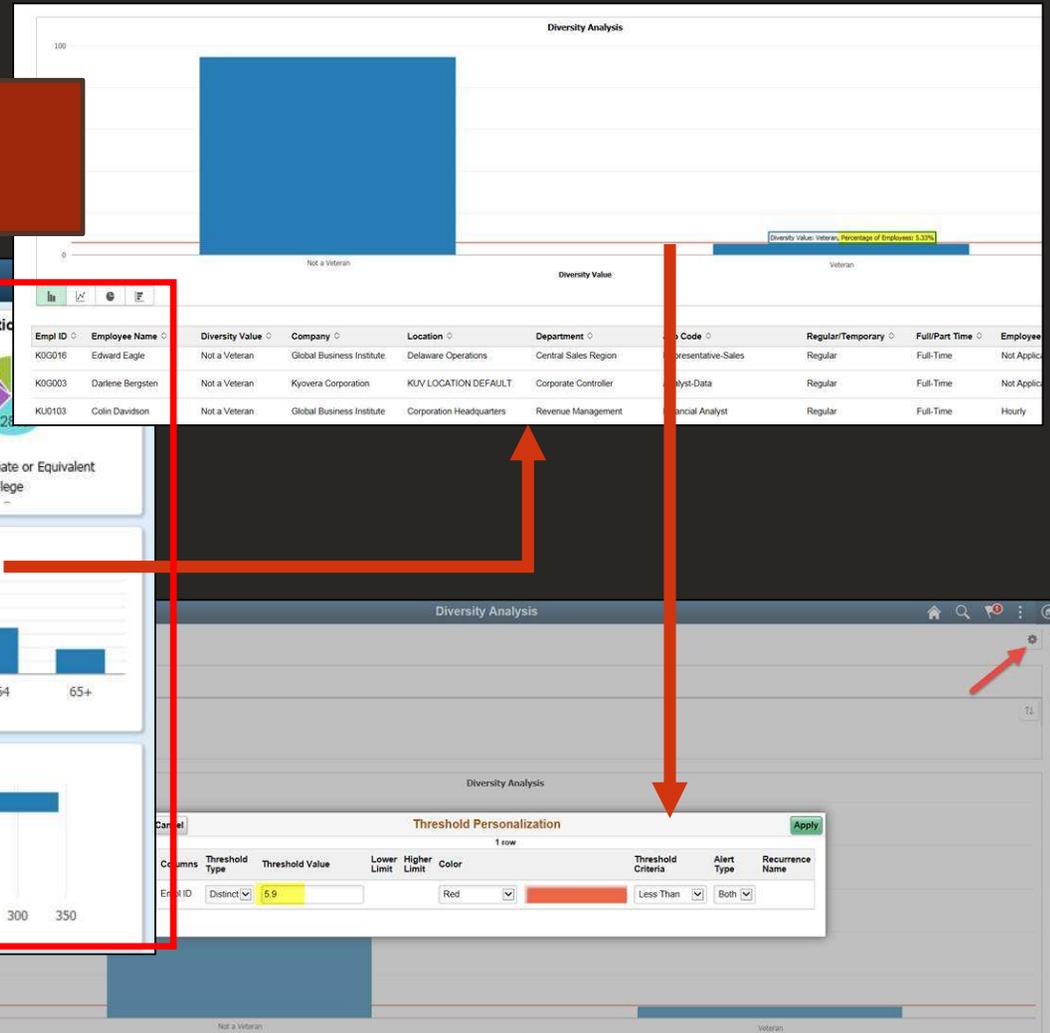
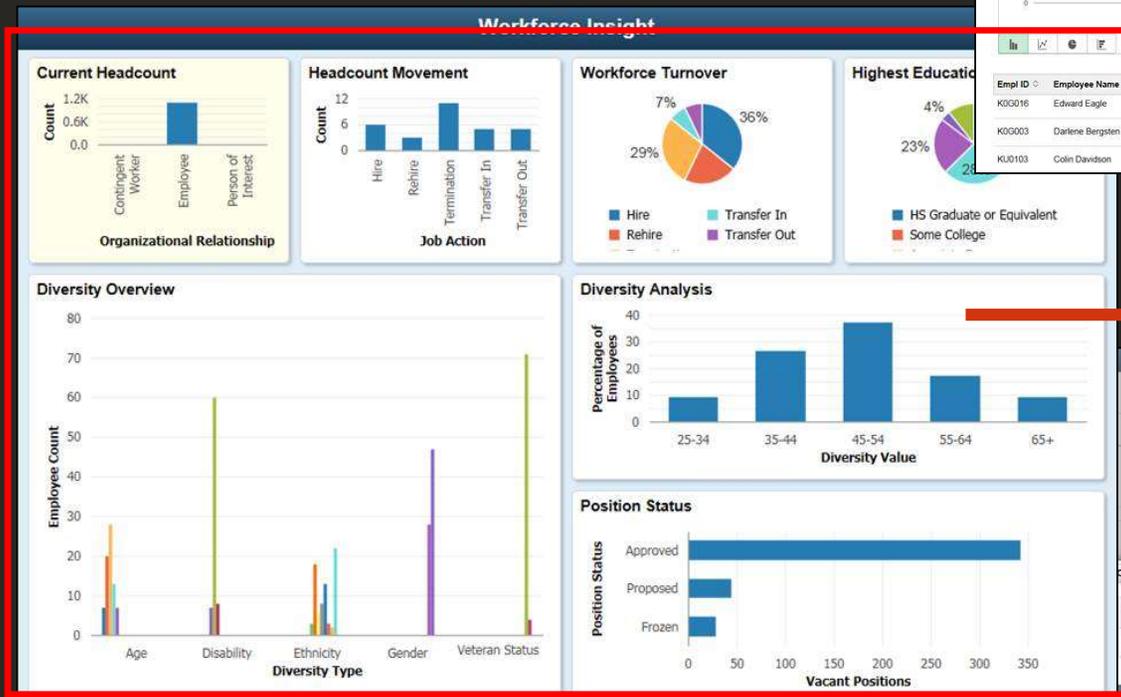


Application Examples

Some Planned Thresholds from Our Applications

Workforce Insight

Any Pivot Grid can be used for thresholds and notifications



Financial WorkCenters

The screenshot displays the Oracle Financial WorkCenters interface. On the left, a table titled "Invoices Not Finalized" lists various invoices with columns for Business Unit, Invoice, Bill To, and Customer Name. A red box highlights the "Related Information" section, which includes "Add Analytics", "Customer on hold", and "Specialist Workload". An orange arrow points from the "Specialist Workload" link to the "Billing Specialist Workload" chart on the right. The chart shows a bar for "Frank G. Joyce" with a value of approximately 24. Below the chart, a list of specialists is shown: Frank G. Joyce, Patrick Larkin, Peter R. Porter, and (Blanks). In the foreground, a "Threshold Personalization" dialog box is open, showing a table with columns for Columns, Threshold Type, Threshold Value, Lower Limit, Higher Limit, Color, Threshold Criteria, Alert Type, and Recurrence Name. The dialog is currently showing 2 rows of configuration.

Columns	Threshold Type	Threshold Value	Lower Limit	Higher Limit	Color	Threshold Criteria	Alert Type	Recurrence Name
Invoice	Distinct	6			Red	Equal To	Push	
Display Amount							None	



Payment Spend Analysis

Image 32



Kibana With PeopleSoft

Current Use
Planned Features



What is Kibana?

- Visualization/analytic tool for Elasticsearch data
- PeopleSoft-Delivered Kibana version—use our's with PeopleSoft
- Installed via DPK
- Many Visualizations available

VISUALIZE & EXPLORE

A picture's worth a thousand log lines

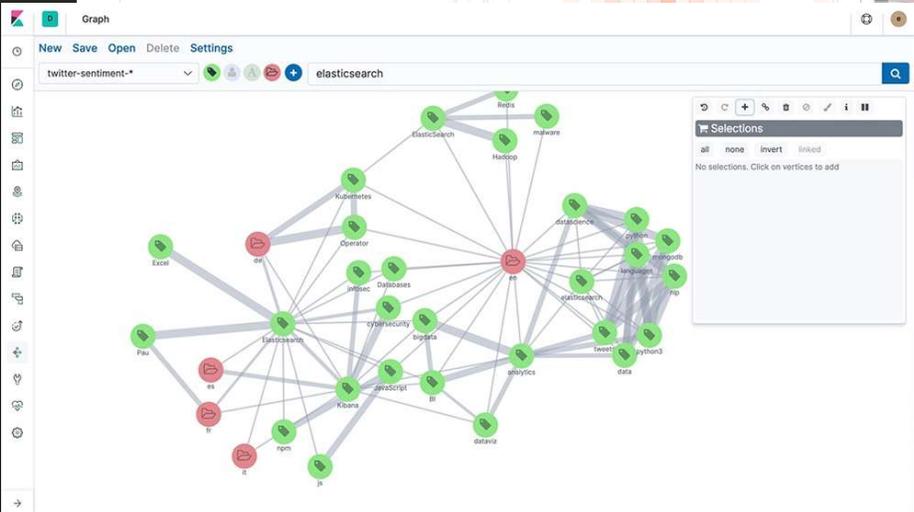
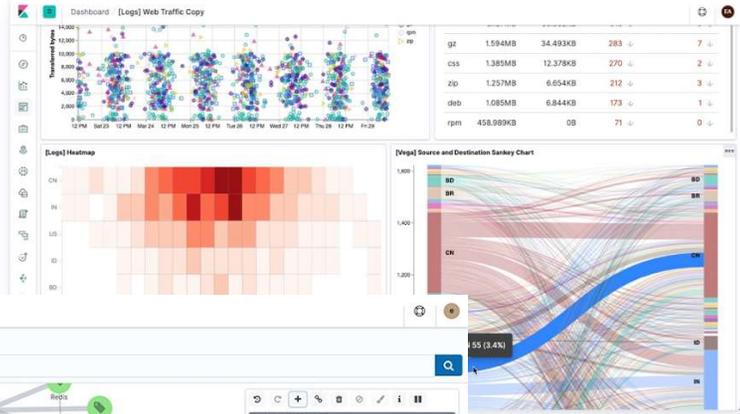
Kibana gives you the freedom to select the way you give shape to your data. And you don't always have to know what you're looking for. With its interactive visualizations, start with one question and see where it leads you. [See the full list of Kibana features.](#)

Basics
Kibana core ships with the classics: histograms, line graphs, pie charts, sunbursts, and more. And, of course, you can search across all of your documents.

Location analysis

Time series

Machine learning



gz	1.594MB	34.493KB	283	7
css	1.385MB	12.378KB	270	2
zip	1.257MB	6.654KB	212	3
deb	1.085MB	6.844KB	173	1
rpm	458.989KB	0B	71	0

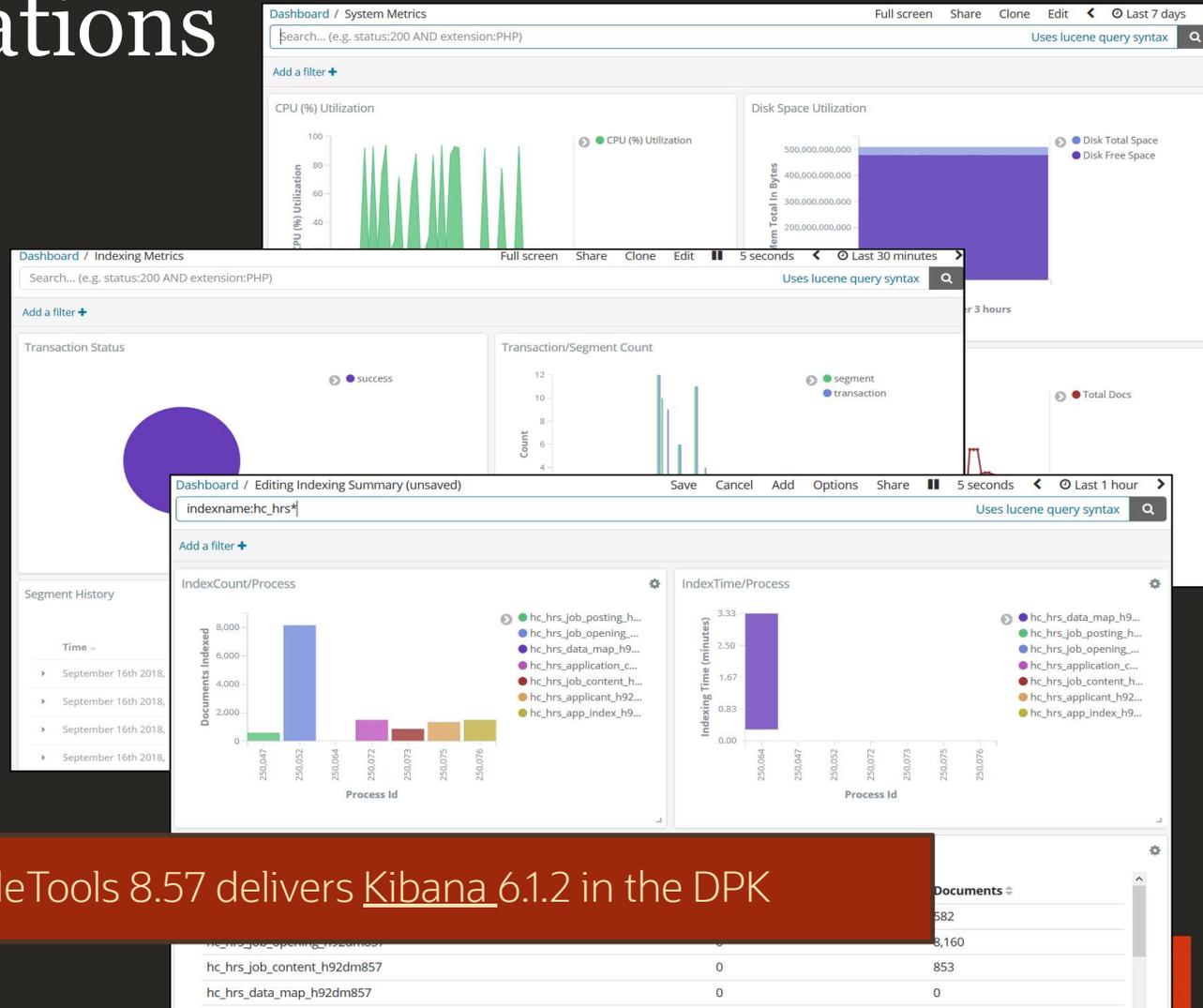


Kibana Visualizations

Currently: 8.57

- For Admin User
- Opens in browser
- Includes three delivered dashboards:
 - System metrics
 - Indexing metrics
 - Indexing summary

Application visualizations planned



PeopleTools 8.57 delivers Kibana 6.1.2 in the DPK

PeopleSoft – Kibana Roadmap

Elastic/Kibana 7.n planned for 8.58

- Access to Kibana in PeopleSoft User Interface
- Discovery of PeopleSoft application data stored in Elasticsearch
- Discover relationships between data
- Perform Indexing and analytics on application data
- Analyze unstructured data
- Relate structured (PeopleSoft) and unstructured data (External Sources)
- Support for other Elastic products

Dashboard / Suppliers by region

Full screen Share Clone Edit

Filters Search

+ Add filter

Supplier Country

Open in Kibana

Filters Search

+ Add filter

Country	Count
USA	270
FRA	30

ORACLE Employee Self Service

Approvals 27

eProcurement

Expenses \$1,037.23 Unapplied Charges

Time Entry

Travel Authorizations 3 Pending Requests

My Service Requests 0 Open Requests

Status Reports

Vendor Class Full View

Vendor Class	Count
Outside Party	400
HCM	200
Employee	100

Related Information

Add Analytics

Applicant Source

Source	Count
Twitter	300
Facebook	200
Indeed	100
LinkedIn	100
Posting	100

Kibana Visualizer

Supplier Country

Vendor Class Pie

Kibana Privileges

Dashboard Name	Role Name	Privilege
Suppliers by region	Search Procurement	Edit
Vendor Classes	Search Procurement	Edit

Create Access

Role Name	Privilege
Search Developer	

Security based on Search authorization



Creating Kibana Tiles and Related Content

PeopleTools > Search Framework > Administration > Kibana Visualizations

Tile Component Level

Filter

Search Clear

5 rows

Content Reference	Label	Full View	Tile View	Height	Width		
APPLICANTS_DB	Applicants	Applicants dashboard	Applicants	1	1	+	-
EARLY_ERP	Early Detection and Monitoring	VOUCHERS - Early Det	VOUCHERS - Early Det	1	2	+	-
PAR_EMPL_ANALYTICS_1	Employees by Department	Employees	Number of Employees t	1	2	+	-
RS_PK_KIBANA_TILE	Top Sources of Applicants	RS_PK_DashBoard_NE	Applicants By Source	1	2	+	-
VENDOR_CLASS_ERP	Vendor Class	Suppliers by region	Vendor Classes	1	1	+	-

Save

Tile Component Level

Filter

Search Clear

1 row

Component Name	Content Reference	Full View	Tile View		
HRS_PE_MY_APPS_FL	HC_HRS_PE_MY_APPS_FL	RS_PK_DashBoard_NEW	Applicant Source	Test Content	+ -

Save

Application Plans For Kibana



Turn AP into a Profit Center!

“Compared to their peers, the Accounts Payable processes at best-in-class organizations:

- Cost less
- Are more accurate
- Take less time
- Provide better visibility
- Result in fewer inquiries from suppliers”

- *Institute of Finance and Management*

Demo

PeopleSoft Analytics with Kibana

Monitor Liabilities and Take Quick Action

Give Your Exec's the Information They Need

business capabilities future data decisions

improve model patterns numbers

outcomes rethink drive trends

strategies workforce insight transparency

—
Demo

PeopleSoft Analytics with Kibana

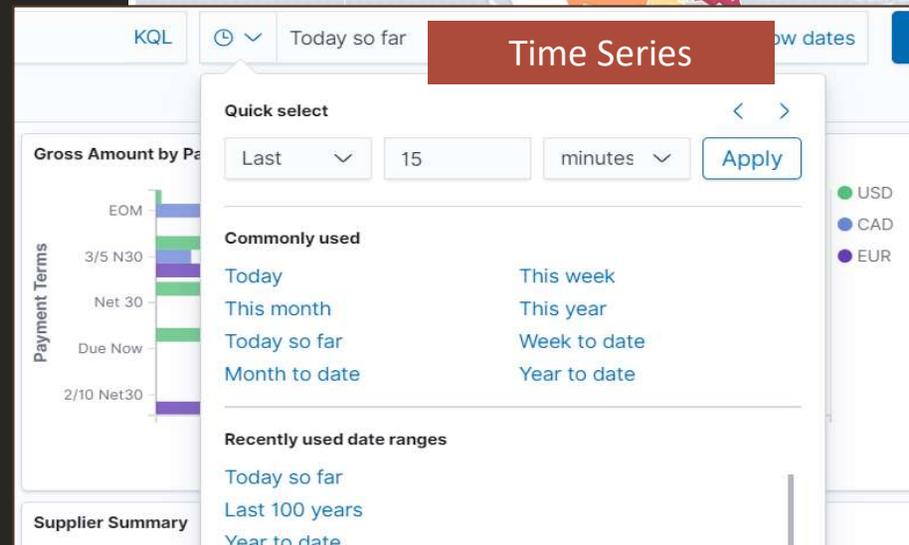
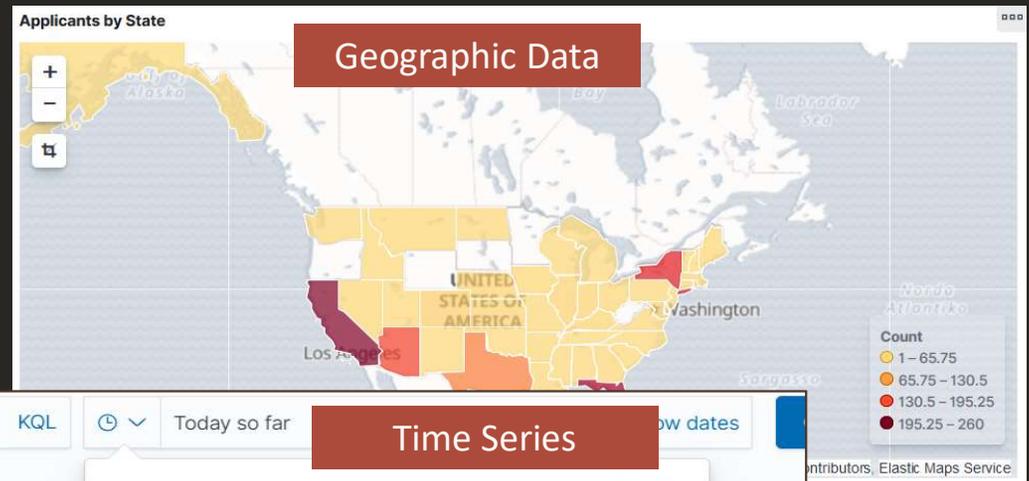
HR and Recruiting



Indexing for Use With Applications?

Examine Your Data Needs...

- Most data that you need is probably already in your Search index
- Some information specifically for analysis would have to be added to an index



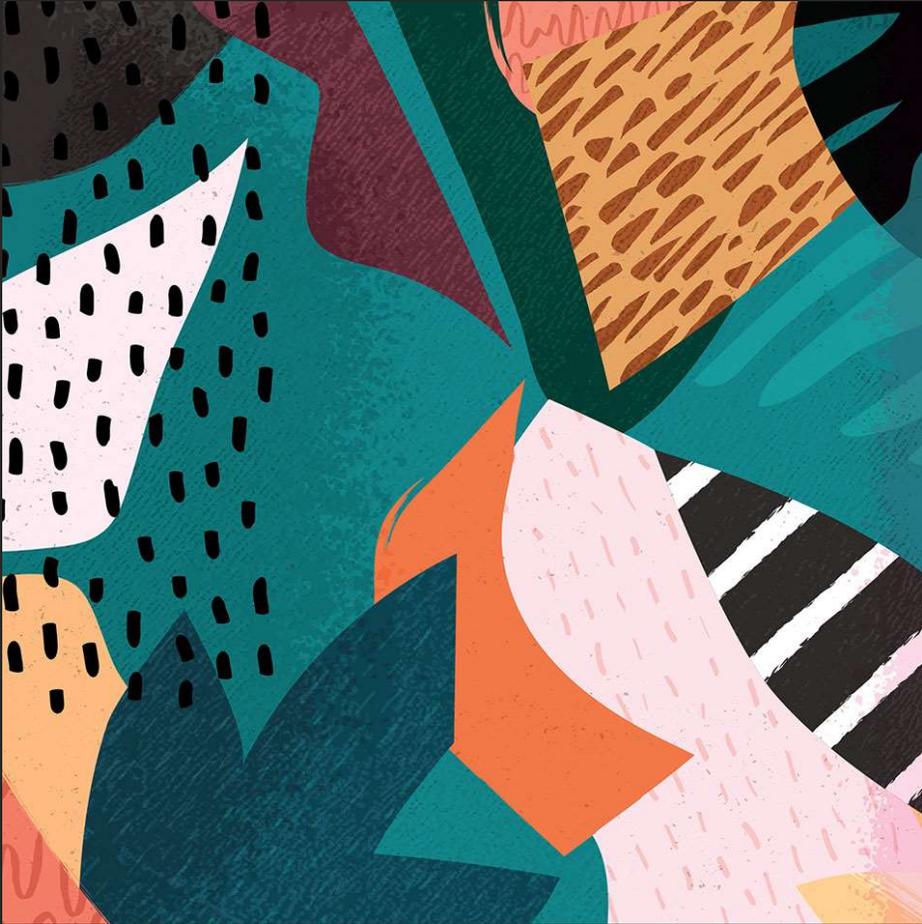
When Should I Use Kibana? When Should I Use Pivot Grids or Simplified Analytics?

Kibana

- Large Volumes of data analyzed
- Performance/Speed is paramount
- Complex analyses like time series or data trends are needed

Pivot Grids

- Contextual to transaction, decision support important
- Fresh data needed (current database, not from Index)
- Want to capture business rules with thresholds and analytic notifications

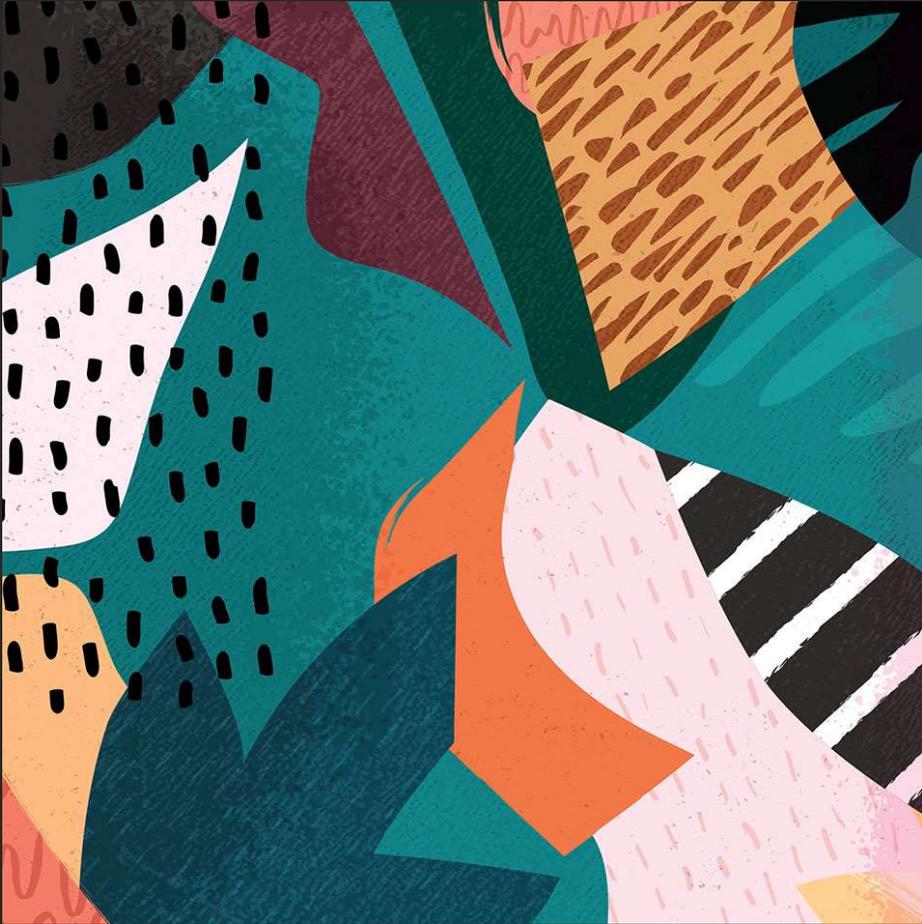


Summary

Great power, performance, and features in Kibana

Continued improvement and enhancement (Elastic and PS Framework)

Easy deployment, takes advantage of existing infrastructure

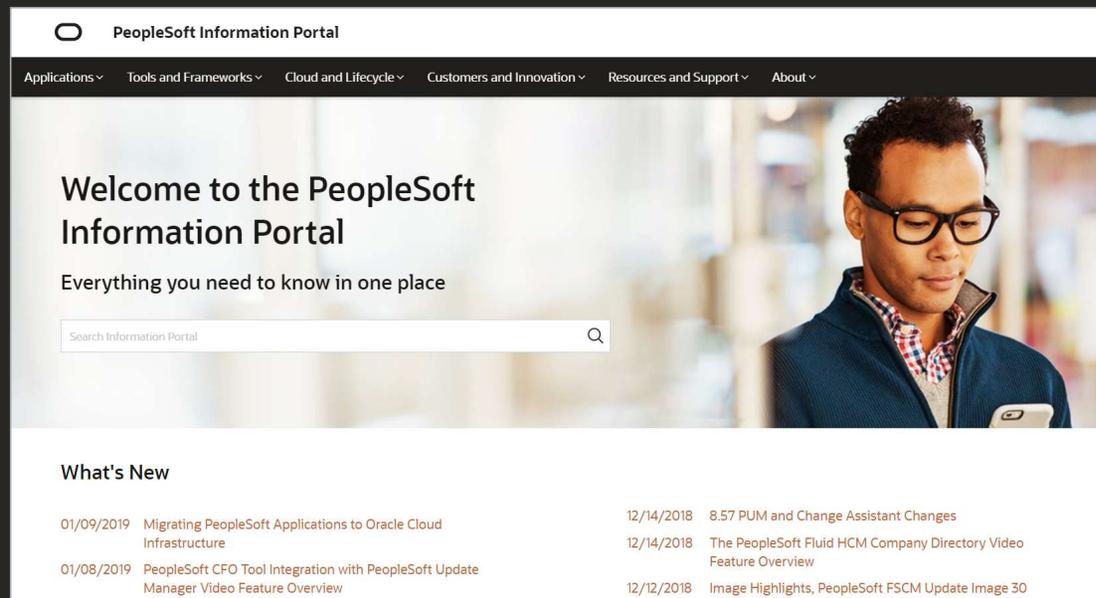


Resources



For More Information

PeopleSoft Information Portal
www.peoplesoftinfo.com



PeopleSoft Information Portal

Applications Tools and Frameworks Cloud and Lifecycle Customers and Innovation Resources and Support About

Welcome to the PeopleSoft Information Portal

Everything you need to know in one place

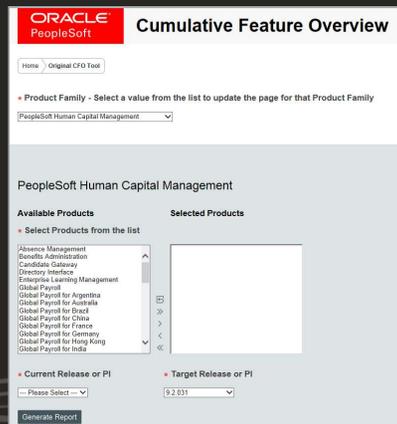
Search Information Portal

What's New

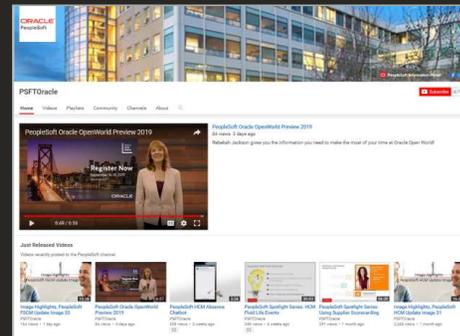
01/09/2019	Migrating PeopleSoft Applications to Oracle Cloud Infrastructure	12/14/2018	8.57 PUM and Change Assistant Changes
01/08/2019	PeopleSoft CFO Tool Integration with PeopleSoft Update Manager Video Feature Overview	12/14/2018	The PeopleSoft Fluid HCM Company Directory Video Feature Overview
		12/12/2018	Image Highlights, PeopleSoft FSCM Update Image 30

For More Information

PeopleSoft CFO Tool
www.peoplesoftcfotool.com



PeopleSoft Video Channel
www.peoplesoftvfos.com



PeopleSoft Planned Features and Enhancements
www.peoplesoftpfe.com



Social Media



Thank You



Appendix



Personalized Analytic Notifications

Demonstrations

- User View
- Administrator View

