Technology Roadmap for PeopleSoft

PeopleTools

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Vice President, IDC Development
Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle’s products may change and remains at the sole discretion of Oracle Corporation.
Today’s PeopleTools

PeopleTools Initiatives and Planned Enhancements

For more information
Today’s PeopleTools

PeopleTools Patches
- Regular patches
- Critical system and security fixes
- Backported changes required by application features or configuration tools

Application Images
- Configuration tools
- Utilities
- Lifecycle management features

PeopleTools Images
- PeopleSoft Cloud Manager
- Integration Hub (critical fixes only)
PeopleTools Support Policy

- Support until the next major release (8.n+1)
- Support for 1 full year
- Critical patches for 1 full year

Delivered First from Cloud Manager

- Significant number of migrations to OCI
- Many success stories
- It’s easy (really?)
- Simplified patch and upgrade
- Where automation is being delivered
- Value for everyone

Premier Support
PeopleSoft’s Strategic Investments

**Analytics**
- Pivot Grids
- Simplified Analytics
- Personalized Analytic Notifications
- Kibana Analytics

**Cloud and Emerging Technology**
- Cloud Infrastructure
- PeopleSoft Cloud Manager
- Oracle Digital Assistant
- Oracle Asset Monitoring Cloud

**Configuration**
- Configuration tools
- Configurable features
- Isolate customization
- Personalization capabilities
PeopleSoft PeopleTools Initiatives

Migrate to Oracle Cloud Infrastructure
to leverage the value of the cloud
Integrate with Oracle Platform as a Service
to enable emerging technology
Analytics
for action and visualization
Configuration
to apply changes more easily
Simplify and Modernize
to make users more productive

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Migrate to Oracle Cloud Infrastructure

Run all or part of your PeopleSoft environments on the Oracle Cloud Infrastructure and Database as a Platform Service
Shifting to Oracle Cloud Infrastructure

Selective Adoption

Create DR from on-premises environments to OCI
Limited benefits

Leverage Cloud Manager
- Subscription
- PUM Deployment
- PUM Configuration
Quick availability of PUM Dashboard
Platform independent
PRP Automation

Pre-Production

Pre-production environments
- Dev
- Test
- UAT
- Demo
- Pilot
- Training
- Sandbox

Complete Operations

Production ready Oracle Cloud Infrastructure
Database cloud service
Benefits
- Cost
- Scalability
- Performance

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PeopleSoft Cloud Manager

Preserve customizations
Backup and restore
Pre-built scripts to automate the migration process
Lifecycle Management
Subscribe to apps and tools maintenance
Quick PUM Provisioning
Automated Tools upgrade and patch
Oracle Cloud Infrastructure *
Oracle Cloud Marketplace
PeopleSoft Image
No additional license cost

* No longer update Cloud Manager Image on Oracle Cloud Infrastructure Classic

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Cloud Manager Roadmap

**CM 3,4,5,6**
- Lift and Shift
- PUM
- Clone
- Tools update
- Elastic Search
- Health Check
- CM Self update
- Tools upgrade
- REST API
- OCI Support
- TDE Support

**CM 7, 8**
- 8.57 Support
- First GA
- On-demand scaling
- RMAN Support
- Custom Scripts

**CM 9**
- Automate Lift
- Tools Update
- Tools upgrade
- Private Subnets
- Visual COBOL

**CM 10**
- Tools 8.58 on Cloud
- CM Auto update
- Import environment
- Elastic File System
- EXA-CS support
- Kibana Support
- Windows MT Support
- Clone in minutes
- Network deployment
- TDE Support
- 18c DB support

**Planned Features**
- DB Refresh
- Govt Cloud
- Resume/Restart
- Load Balancer
- Auto Patching
- ATP Support
- Shared PS_HOME
- Policy based Governance
• Results of the migration

With minimal internal headcount, no in-house infrastructure, and a tight budget, First Financial Northwest Bank was able to rapidly implement PeopleSoft FSCM directly onto Oracle Cloud Infrastructure in 4 months. With the help of SpearMC Consulting, FFNWB was able to migrate their Accounting, Asset Management and Accounts Payable functions off of a competing Fiserv product onto Oracle PeopleSoft.

By keeping the implementation "vanilla" and utilizing all the latest and greatest features and functionality, they are recognizing immediate improvements in their business processes.

Utilizing OCI’s native features like scalable computing power and storage, disaster recovery functions and speedy networking, FFNWB has modern, top of the line infrastructure that is secure and will meet their needs for years to come.
PeopleSoft on OCI

Customers running PeopleSoft on the Cloud

Partners that have supported them
Integrate with Oracle Platform as a Service

An easy way to extend your PeopleSoft capabilities is by adding features available through Oracle Platform as a Service Products
Integration Options with Oracle Platform as a Service

- Database as a Service
- Exa Cloud Service
- Identity Cloud Service
- Integration Cloud Service
- Management Cloud Service
- Autonomous Database Cloud Service

**Application Directive**
Integrate with the Asset Monitoring Cloud to track Asset Location Real-time
Delivered with FSCM Image 33

**PeopleTools Framework**
PeopleSoft Chatbot Integration Framework delivered with 8.57.07 to simplify and standardize use of Oracle Digital Assistant

**Early Phases**
Data Science Cloud Service - Artificial Intelligence and Machine Learning using models made from data extracted from PeopleSoft
Summary of PeopleSoft Chatbot Deliverables

PeopleTools (8.57.07)
- Application Services Framework (ASF)
- Security

Chatbot Integration Framework (HCM PI 31 in EC)
- Web Chatbot UI
- Standard Authorization Process
- PeopleSoft Library
- Skill Template (sample skill)

Lifecycle Management Guidelines for PSFT and ODA
- Initial delivery
- Ongoing maintenance

Applications Skills
- Absence Skill – HCM PI 32
- Company Directory – HCM PI 33
Chatbot Partner Ecosystem

- Chatbot pilots
- Demos
- Proofs of concept
- Integration with Oracle Digital Assistant (ODA)
- Pre-built libraries
- Multiple languages
- Business cases
- Training and Support

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Artificial Intelligence/Machine Learning

Evaluating how PeopleSoft can work with Oracle Data Science Cloud Service to deliver AI/ML

- Extract data from PSFT into models
- Add external data to models
- Build models in Oracle Data Science
- Evaluate by individual organizations
Analytics

Improve the visualization of PeopleSoft data and the actions that can be done
Analytics

Use ours. Build your own. Put them on dashboards. Use them in Related Content.

**Simplified Analytics**
Extend the power of your Pivot Grids. Allow end users to personalize.

**Personalized Analytic Notifications**
Put the system to work for you. Monitor thresholds set on your Pivot Grids. Centralize or even better... personalize.

**Kibana**
In-app data visualizations that won't impact system performance. New data discovery capabilities. Powerful drillable analytics.
Threshold settings and notifications at individual data point level

**Personalized Analytic Notifications**

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 choose a list of users to be subscribed or leave it open for all users to subscribe.
Kibana Analytics

Kibana is an open source analytics and visualization platform delivered in the PeopleTools DPKs that provides data visualization for the Elasticsearch indices.
Kibana in PeopleSoft

PeopleSoft data security enforced on all Kibana visualizations

Ability to embed Kibana analytic on a Homepage, Dashboard or Related Content

System metrics, indexing metrics and indexing summary

PeopleSoft Healthcenter using Kibana analytics

Application teams enhancing Elasticsearch indices for more and richer data to use with Kibana
Kibana vs. Pivot Grids

Use Kibana

• Data only exists in index
• Large Volume
• Performance is important
• Complex Analysis
  • Time series/historic
  • Data trends
  • Interactive exploration

Use Pivot Grids

• Actionable
• Real-time
• Online-relevant
• End-user model
• Triggers notification
• Transactional data
Data Masking in Query
In support of GDPR, you can now use the Application Data Privacy Framework to mask Query results. This impacts all sub-products using Query as a data source.

BI Publisher support for Excel Templates
Supporting the use of Excel Layout templates in our integrated reporting tool will greatly benefit our customers, allowing them the ability to design spreadsheet reports with much greater control than they have when using RTF or XSL templates.

New timeline object in PeopleSoft Charting
Timelines give applications a way to visualize a process using chronological order. When details are displayed graphically, important points in time can be more easily seen and understood.

Process Scheduler
API to delete run control id

Improved Charting
Donut pie charts, advanced visualization APIs like timeline and thematic maps, calendar visualization, reference line/area for Y-Axis charts, custom styles (gradient or heatmap) for bar charts.
Configuration

PeopleSoft changes and customizations are made using configuration frameworks or by isolating customizations, allowing maintenance and new features to be adopted much more easily.
Isolating Customizations

Event Mapping
- Subpages, secondary pages and nested pages
- Work record
- New events: FieldEdit and FieldDefault

Drop Zones
- Delivered in application images
- Support for Classic Pages

Page and Field Configuration Utility
- Secondary pages
- Inactivate sequences
- Hiding sensitive data

Pluggable AppEngine
- Insert steps before or after delivered
- Skip over steps without removing
- Limited to SQL and PeopleCode steps
We love the new Page and Field Configurator and Event Mapping, which has helped us eliminate some existing customizations and avoid several new customizations. Our objective is to eliminate 50% of our existing customizations in the next two years.
Simplify and Modernize

PeopleSoft applications will be intuitive and take advantage of the latest user interface features
New Stylesheet
PeopleSoft UI
Chatbots are a new User Experience

Legacy PSFT Components – Classic Plus

- Responsive PSFT UI – FluidUI
- Guided Processes – Activity Guides
- Chatbot
  - User Driven
  - Conversational
  - Requires ODA
Putting More Power in the Hands of Your Users

- Users set notification preferences centrally
- Choose notification channels:
  - Text (partnership with Twilio)
  - Notification window (in app)
  - Email
- Take action directly from notification window
What Happens to Approvals When You’re Not There?

Fluid Delegations Provide Continuity

- Delegate approvals when you’re away
- Centralized and consistent across HCM and FSCM

Coming soon in Applications updates
End of support for PeopleTools Classic

PeopleTools 8.57 will be the last PeopleTools release that supports Classic Navigation. Will not remove Classic Navigation style so it can be still be used 'out of support'.

Encourage use of Fluid Navigation.

MOS Tech Update Doc ID 2585909.1
Platform Enhancements

Infrastructure DPK
- Latest fully patched infrastructure components
- Used to override infrastructure delivered with Tools DPK
- Available after every CPU

DB2 Universal Table Space
8.58 based PUM Images will be based on Oracle Linux 7.x and Oracle Database 19c

Elasticsearch update with 8.58
- Incorporate Elasticsearch, Logstash, and Kibana 7.x
- No need to do full indexing for an upgrade
PeopleSoft has transitioned from Net/Server Express to Visual COBOL. PeopleTools 8.57 will be the last release certified with MF Net/Server Express. There is no additional cost to transition to Visual COBOL.

Low impact - our testing uncovered no changes to COBOL code.

Minimum PeopleTools patch levels:
- PT 8.56.16
- PT 8.57.05

Net/Server Express go into sustaining support for PS after December, 2020.

Additional information:
- FAQ – PS Visual COBOL  (Doc ID 2525494.1)
- Tech Update - Main Page  (Doc ID 764222.1)
Security Enhancements

Updates to Data Masking, including PSQuery
OAuth Support for Authorization
“Real” IP Address Support “X-FORWARDED …” type addresses

Updates to Red Paper, for example:
• Understanding OAuth vs Authentication
• New "real" IP Addresses
• Need to protect email servers and DNS (internal, external, and poisoning)
  - Including Ransomware mitigation
• Discussion on CSRF and SSRF
• Restrict access to log/trace files
• Clarify use of certs for JSL and WSL
People Tools - Notifications
• Type of Notifications

Notification Features - traditional

• Worklist is accessible only from PIA

• Email is an offline notification with a link to worklist
Notification Features - traditional

- AWE
- TBE
- SendMail
- MCFOutboundEmail
Push Notification Framework - 8.54

- Updates UI with real-time notifications when a pre-defined Event is triggered

- Define Event or Event Collection
- Subscribe to the Event/Event Collection
- Publish an Event

- Provides an option to give real-time notification for Worklist
A framework to publish real-time alerts to user browser is provided through Publish To Window Framework.

**Notification Window**

- Worklist is accessible only when user navigates to the page. Requires constant monitoring.

- In 8.54, Publish To Window is implemented for TriggerBusinessEvent, giving users real-time alerts when a worklist is created.
ComponentLife

Publish Code

```java
PTPN_PUBLISH:PublishToWindow &wlSrch;
&msginfo = PTPN_BROADCAST.PTPN_BC_MSG.Value;
&wlsrch = create PTPN_PUBLISH:PublishToWindow("SENDNOTE", "BROADCAST");
&wlsrch.AddRecipient(&user, 1);
&wlsrch.SetCategoryAlias("BROADCAST");
&wlsrch.SetMsgInfo(&msginfo);
&wlsrch.SetCategoryTypeFyi();
&wlsrch.SetMsgStateNew();
&wlsrch.SetMsgKey(GenerateRandomDataKey());
&wlsrch.Publish('');
```
Text messaging is available as one of the notification options under Notification Configuration.

The URL identifier ‘PTTEXTMESSAGING’ is delivered to configure Twilio account for text messaging support.

- User phone number must be provided under Notifications section available at ‘My Preferences’ -> ‘General Settings’, to receive text messages.
- The phone number should be in E.164 format (+<Country Code><Area Code><Phone Number>)
Text Messaging
• ‘Notification Configuration’ component to control the notification types to be received by users.

• Any applications using Push Notification framework through PTPN_PUBLISH application package get the feature just by configuring notification with the existing ‘Category Name’ and ‘Event Name’.

• Administrator can configure a default notification type, allow users to personalize or restrict users from disabling all channels.
Notification Configuration

View Notification Configuration

3 results found.

<table>
<thead>
<tr>
<th>Notification Name</th>
<th>Event Name</th>
<th>Description</th>
<th>Owner ID</th>
<th>Functional Category</th>
<th>Push</th>
<th>Email</th>
<th>Text</th>
<th>Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGThresholds</td>
<td>PTPG_THRESHOLD_NOTIF</td>
<td>Personalized Analytic Notifications</td>
<td>PT</td>
<td>Pivot Grid</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>TriggerBusinessEvent</td>
<td>TRIGGERBUSINESSEVENT</td>
<td>Trigger Business Event</td>
<td>PT</td>
<td>Workflow</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>BROADCAST</td>
<td>SENDNOTE</td>
<td>Broadcast Notifications</td>
<td>PT</td>
<td>Notifications</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>
Primary Key – Same as Category Name, earlier

Event Name as registered with PUSHTOWINDOWCOLLECTION

Enable this to disallow users from disabling all the channels

Channels available for users. Pre-configurations may be required

Users get a notification by default in the selected channel

Enable to allow users to opt for different channels

Chose the Permission List/Role of users who can personalize. Empty grid enables it for all
### Notifications

#### Display Settings
- Notification items to display

#### Notification List

<table>
<thead>
<tr>
<th>Notification Name</th>
<th>Description</th>
<th>Notification Window</th>
<th>Email Notification</th>
<th>Text Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 BROADCAST</td>
<td>Broadcast Notifications</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>2 PGTThresholds</td>
<td>Personalized Analytic Notifications</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>3 TriggerBusinessEvent</td>
<td>Trigger Business Event</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
TriggerBusinessEvent – Manage Notifications

• ‘TRIGGERBUSINESSEVENT’ is a pre-delivered notification configuration used for all the TBE notifications

• Configuration for an individual event can be changed by using ‘Notification Configuration Override’ option

• A notification configuration used to override, must be mapped with Event TRIGGERBUSINESSEVENT
PeopleTools -> Push notifications -> Notification Window -> Configuration -> System Configuration

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Activity</th>
<th>Event</th>
<th>Worklist</th>
<th>Priority</th>
<th>Enable</th>
<th>Notification Configuration Override</th>
<th>Notification Text Message Set Number</th>
<th>Notification Text Message Number</th>
<th>Notification Category Message Set Number</th>
<th>Notification Category Message Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>No</td>
<td>127</td>
<td>4</td>
<td>127</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>Yes</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>9</td>
</tr>
<tr>
<td>3</td>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>Yes</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>9</td>
</tr>
<tr>
<td>4</td>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>No</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>9</td>
</tr>
<tr>
<td>5</td>
<td>GE_ACTIVITY_GUIDE_DEMO</td>
<td>GE_ACTIVITY_GUIDE_START</td>
<td>ACTIVITY_GUIDE_WKST</td>
<td>Activity Guide Demo</td>
<td>Default</td>
<td>No</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>9</td>
</tr>
</tbody>
</table>
## Notification Configuration

**Notification Category**: Recycle Test

- **Event Name**: TRIGGERBUSINESSEVENT
- **Description**: Recycle Order
- **Functional Group**: Workflow
- **Object Owner ID**: PeopleTools Demo
- **Mandatory**: No

### Notification Options

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>Available</th>
<th>Enable By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Push</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Email</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Text</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

### Personalization Settings

- **Allow Personalization**: Yes

### Authorized Roles and Permission Lists

- **Type of Authorization**: 
  - **Role Name**: 
    - **Role/Permission List**: 
      - **Add**: 
      - **Remove**: 

### TriggerBusinessEvent

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Activity</th>
<th>Event</th>
<th>Worklist</th>
<th>Priority</th>
<th>Enable</th>
<th>Notification Configuration Override</th>
<th>Notification Text Message Set Number</th>
<th>Notification Text Message Number</th>
<th>Notification Category Message Set Number</th>
<th>Notification Category Message Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>QE_PROCESS_ORDERS</td>
<td>QE_VA_TEST</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>No</td>
<td></td>
<td>137</td>
<td>4</td>
<td>137</td>
<td>3</td>
</tr>
<tr>
<td>QE_PROCESS_ORDERS</td>
<td>QE_VA_TEST</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>Yes</td>
<td></td>
<td>158</td>
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<td>158</td>
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<td>QE_APPROVE_ORDER</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>Yes</td>
<td>RecycleTest</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QE_PROCESS_ORDERS</td>
<td>QE_APPROVE_ORDER</td>
<td>Approve Order</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QE_ACTIVITY_GUIDE_DEMO</td>
<td>QE_ACTIVITY_GUIDE_START</td>
<td>ACTIVITY_GUIDE_WORKLIST</td>
<td>Activity Guide Demo</td>
<td>Default</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Pivot Grids can be personalized to send notifications based on a threshold criteria.

• All Personalized Analytic Notifications use the pre-delivered 'PGThresholds' notification configuration.

• A Pivot Grid view allows user to either enable or disable all notifications for it.
## Notifications

### Display Settings

Notification Items to display: [ ]

### Notification List

<table>
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</thead>
<tbody>
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<td>1. PGThresholds</td>
<td>Personalized Analytic Notifications</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>2. Approvals</td>
<td>Expense Approvals</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>3. BROADCAST</td>
<td>Broadcast Notifications</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
1 rows matching threshold criteria for Display Paid Amount (Payment Spend Analysis) for VP1

Page=PTPG_NUI_VWR&PGNAME=PO_SPEND_FL_PAID_PVG&VIEWNAME=PO_SPEND_FL_PAID_PVG.View
• Support for Bulk Notifications
• Selection by Role or User Id
• Broadcast
• Notification channels can be configured
• Meta-variables for personalized messages
Other 8.58 features

- Notification
  - Archive and Purge needs Message State/inactive choice
  - Ability to send Broadcast Notifications to large groups of users
Other 8.58 features

- Pivot Grids
  - Pivot Grid – Threshold Improvements
  - Ability to format non-currency fields to Display 1000 separator
  - Facet category UX
  - Expand/Collapse/Invisible configuration
  - Sequencing of facet categories
  - Ability to export current Pivot Grid view
  - Ability to define order or sequence values on X-Axis
Other 8.58 features

- **Application Services Framework (Chatbot)**
  - File Processing – Attachment support for Chat bot application
  - OAuth2 uptake for Application Service Framework

- **Process Scheduler**
  - SetEmailOption have an option to add "From" email address
  - Run Control ID Management
Thank you
PeopleSoft Search and Internet Architecture

PeopleTools 8.58

Ramasimha Rangaraju
Director, PeopleSoft Internet Architecture and Search Development
Feb 06, 2020
Safe harbor statement

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PeopleSoft Search
Program agenda

1. Introduction to Kibana
2. PeopleTools 8.57 – Visualize System and Indexing Metrics using Kibana
3. PeopleTools 8.58 – Visualize Application Data using Kibana
5. Developing Visualizations
6. Dashboard Security
7. Elasticsearch 7.0
8. Multi Select Facet Improvements
9. Search Results Data masking
Kibana

An Open Source analytics and Visualization platform from Elastic

• Data Aggregation based on various fields and parameters
• Multiple mechanisms to filter data
• Flexible and Intuitive interface with variety of Visualizations
• Geographic distribution of data
• Time Series distribution of data
PeopleTools 8.57 – Visualize System and Indexing Metrics using Kibana

- Elasticsearch DPK in 8.57 ships Elasticsearch and Kibana (ESK DPK on 6.1.2)
- Usage of Kibana for analytics was limited to monitoring ES server
- Application Search Indexes were not shown in Kibana
- Kibana can be accessed only by esadmin user
- Delivered dashboards
  - System Metrics
  - Indexing Metrics
  - Indexing Summary
PeopleTools 8.58 – Visualize Application Data using Kibana

- PeopleTools 8.58 extends Kibana to PeopleSoft Application data
- All PeopleSoft data which has been indexed for Search can be Visualized and analyzed using Kibana
- Application users can Create /View Visualizations
- Data security is same as in Global Search or Keyword Search
- Kibana dashboards can be presented in PeopleSoft as Tile or Related Information
- Kibana access can be secured further with dashboard specific roles
Kibana Login

Direct Login
- Uses Kibana URL
- Applicable for Admins or limited users
- PeopleSoft User/Password/Database
- Authentication is real-time by PeopleSoft callback

Access in PeopleSoft
- Users can access Kibana dashboards in PeopleSoft
- Presented as Tile or Related Information
- User will be authenticated in the background, no additional login required
Creating Index Pattern

- Existing application search indexes are accessible in Kibana to build analytics
- Access to data is secured with row level security
- Document access will be same as in Global/Component search
Kibana Dashboard Development – Step 2
Create Visualization/Dashboards

- Visualization is a tabular or chart representation of aggregated data from Elasticsearch
- Dashboard is a logical grouping of visualizations
Import Kibana Dashboards
Search Framework > Administration > Import Kibana Dashboards

- PeopleSoft Applications define Dashboards in Kibana and import them to PeopleSoft Database
- The Imported Dashboards are delivered through PeopleSoft database
Kibana Visualizations
Search Framework > Administration > Kibana Visualizations

- Imported Dashboards can be configured as
  - PeopleSoft Tile
  - Related Information of a component
Deploy Kibana Dashboards
Search Framework > Administration > Deploy Kibana Dashboards

- Deploy is Done in Kibana in Customer Environment
- Dashboards delivered in PeopleSoft Database are copied to Kibana using Deploy Action
Kibana Privileges
Search Framework > Administration > Kibana Privileges

- User with Search Administrator role has full control in Kibana
- Permissions to the Kibana dashboards can be restricted using Privileges mapped
  - Dashboard can be provided with Edit Roles or View Roles
  - User with Edit Roles would be allowed to change dashboards in Kibana
  - View Roles, limits the usage to view and filter but no edit
Elasticsearch 7.0.0

- PeopleTools 8.58 supports Elasticsearch, Logstash & Kibana on 7.0.0
- 8.58 **does not** support ES 6.1.2
- DPK supports upgrade of ES 6.1.2 to ES 7.0 – **No need for re-indexing**
- ELK DPK on 7.0 certified on Linux and Windows
  - ELK-DPK-WIN-7.0.0_01.zip
  - ELK-DPK-LNX-7.0.0_01.zip
- Logstash installation is necessary only for Health Center implementation
Multi Select Faceting- Improvements

- Hierarchy Facets by default are enabled for Multi Select Faceting
- Default display is Collapsed Tree nodes
- Select the checkbox to filter the facets
- One breadcrumb for each selected tree node, instead of one for entire tree facet
- Configurable option for Tree nodes default state collapsed/expanded.
  - System level
  - Search Category Facet level
Multi Select Faceting - Improvements

View Search Results
14 results for keyword: "%"

- 2019/06 | 2018/03 | Clear All

- **Job Posting: Registered Nurse - RN - 505002 | External Posting**
  Recruiting Location: General Hospital | Department: Nursing | Job Family: Nursing

- **Job Posting: Administrative Assistant - Confidential - Human Resources - 505008 | External Posting**
  Recruiting Location: Corporation Headquarters | Department: Human Resources | Job Family: Administrative Support

- **Job Posting: Executive Assistant - 500051 | Internal Posting**
  Recruiting Location: Corporation Headquarters | Department: Human Resources | Job Family: Administrative Support

- **Job Posting: Senior Nurse Manager - 504006 | Internal Posting**
  Recruiting Location: Arizona Operations | Department: Lab Facility | Job Family: Clinical

- **Job Posting: Executive Assistant - 500051 | External Posting**
  Recruiting Location: Corporation Headquarters | Department: Human Resources | Job Family: Administrative Support

- **Job Posting: Procurement Manager - 504072 | External Posting**
  Recruiting Location: | Department: Revenue Management | Job Family: Accounting

- **Job Posting: Procurement Manager - 504072 | Internal Posting**
  Recruiting Location: | Department: Revenue Management | Job Family: Accounting

- **Job Posting: Sales Product Consultant - 303867 | External Posting**
  Recruiting Location: California Location | Department: Western Sales Region | Job Family: Sales
Search Results Data Masking

- To mask certain fields from showing sensitive data in search results
- Provided new APIs to mask on specific code area
  - Field.SetDisplayMask is the peoplecode API to mask any field
  - SearchInit peoplecode on a Search record key field to mask any sensitive data in search results.
- Data masking feature is available for both classic and fluid component search
- Applicable on both real-time and keyword component search
PeopleSoft Internet Architecture
Topics

1. Event Mapping
2. Activity Guide
3. Fluid Core
4. Core Tech
5. Drop Zones
6. Combining Related information and simplified Analytics
7. Updated Style Sheets
8. Configuration Specialist
9. Classic Plus Updates
Event Mapping

EVENT MAPPING FOR NESTED SUB OR SECONDARY PAGES/RECORDS/FIELDS

- A new option to allow users to select Pages (Standard and Secondary), Records, Record Fields system wide [and not just restricted to Level 0].
- A new check box called 'unrestricted prompt' would enable users to achieve this selection.
- This also allows user to handle use cases where the modal pages that are invoked via DoModalX() call would need event mapping configurations on the pages or records and fields.
Event Mapping

SUPPORT FOR RECORD FIELD EDIT AND FIELD DEFAULT EVENTS

- Users will now be able to configure Event Mapping for additional two events in addition to the existing FieldChange event.
  - FieldEdit
  - FieldDefault
Event Mapping

**SUPPORT FOR SEARCHINIT AND SEARCHSAVE EVENTS**

- Users should be allowed to be able to associate event mapping hook on to additional events of the component's search record at the record and field level.
  - Search Init Event
  - Search Save Event
- This should be applicable for Search and Prompt Pages.
Event Mapping

SUPPORT FOR ADDITIONAL EVENTS – Visualisation/Reference In Application Designer

- Users will be intimated about the events associated via event mapping in application designer for the new events as well.
Event Mapping

ABILITY TO USE SINGLE APPCLASS SERVICE ID FOR MAPPING MULTIPLE EVENTS

- Users will be able to create one application class for a RC Service and can map it to multiple event mapping configuration for all types of events.
- User will provide a parameter that will be passed on at the Application Class level for users to decide on the functionality that they would need to run.
- This is considered as a good to have feature that saves time and creation of multiple service ids and application classes.
The following application class presents an example of how `eve_execute` could be implemented:

```java
import PT_RCF:ServiceInterface;

class App_Class1 implements PT_RCF:ServiceInterface

    method execute();
    method eve_execute(&str As string);
end-class;

method execute
    /* Extends/implements PT_RCF:ServiceInterface.execute */
end-method;

method eve_execute
    /* &str as String */
    /* Extends/implements PT_RCF:ServiceInterface.eve_execute */
    /* &str variable will have the Event Map Parameter that was set in the configuration page for that particular event that is being triggered.*/
    Evaluate &str
        When = "1"
            /* Code block for PreBuild event */
        When = "2"
            /* Code block for PostBuild event */
end-method;
```

Event Mapping:ABILITY TO USE SINGLE APPCLASS SERVICE ID FOR MAPPING MULTIPLE EVENTS (Cont..)
To implement masking of sensitive/PII fields in Prompt records. This can be achieved using the SearchInit and SearchSave events on the Prompt Record fields. However, the Search events for prompt records will be triggered only if the Record-Field property is enabled.
Activity Guide – Supporting Multiple Languages in an instance
Activity Guide – Display steps based on User Role

Welcome to Marital Event

- Betty Locherty
- A marital status change is a good time to reconsider your health care coverage, tax withholdings, and other important information.
- This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.
Activity Guide - Re-parenting Activity Guide folder navigation

Activity Guide configuration pages are moved under PeopleTools root folder. Portal Administrator role is NOT mandatory anymore to administer activity guide templates.
New Window Option in Fluid Navigation Collection
PIA – New Custom Property in Web Profile

PIA maintains default timeout value of 600 sec.

If the customer want to change the timeout then a new custom property ("tokenExchangeGuidTimeout") needs to be added in the custom properties.

In addition to this, tools is providing a new people code API to read the timeout value programmatically.

API details: GetTokenExchangeGuidTimeout() in PT_WEBPROFILECONFIG(application_package)
PeopleSoft Drop Zones - Enhancements in PeopleTools 8.58

- Drop Zone support for Classic pages.

**Drop Zone Enhancements**

- Configure Drop Zone for unregistered components.

- Drop zones can be added to subpages or secondary pages at any nesting level.
PeopleSoft Drop Zones

- Classic Pages
- Nested Subpages / Secondary pages
- Drop Zones
- Unregistered Components
Drop Zone support for Classic pages.

- PeopleTools 8.58 has a new functionality to create Drop zones in Classic Pages.
- Classic Sub-page containing fields can be added to an existing Classic Page.
- The Fields from the main Classic Page and the configured Sub Page can be saved simultaneously.

User is provided with an option to limit search to Classic or Fluid components only.
Configure Drop Zone for unregistered components.

- In 8.57, Drop zone works based on Content Reference. Drop zone configuration does not show components without CREF registration in search results.
- In 8.58, Drop zone configuration search results contain components without any CREF registered.
- User can configure drop zones on unregistered components and get it successfully rendered on target pages.
- No Changes from end user perspective in terms of GUI
Support for all nesting levels in drop zone configuration

- In 8.57 GA, Drop Zone configuration support subpages or secondary pages in two nesting levels.

- In PeopleTools 8.58, Drop zones can be added to subpages or secondary pages at any nesting level.

- Examples of Drop zone configurations supported as follows:
  - Main Page -> Sub page -> Sub page -> Sub page -> Sub page -> drop zone
  - Main Page -> Sub page -> Secondary page -> Sub page -> Secondary page -> Sub page -> drop zone.

- This feature is available in 8.57 patch 04 onwards.
Combined sequencing of Related Information and Analytics

- Link and Tile items can be sequenced as per user preference.
- Link and Tile sections can be swapped.
- Sequencing done by user can be reset to default ordering.
Updates to Personalize

Display Properties tab
Most frequently used operations, Display (Show/Hide) and reordering are handled in this tab. Recording achieved by drag and drop.

Additionally, this tab provide options as follows.
- Reset user reordering to default order
- Swap the Link and Tile sections.

Manage Analytics tab
This tab will have items applicable only to Analytic Items.
- This tab will handle conversion of Analytics from Link to Tile and Vice versa as well as Delete.

Personalize window split into two tabs.
Updated Style Sheets

PeopleSoft user interface is updated with a contemporary look in PeopleTools 8.58. All Fluid / Classic Plus components are updated to new look and feel. No layout changes or size changes. No user interaction changes.
Configurable items delivered by PeopleTools help customers to safely and easily upgrade and navigate business changes.

Configuration Specialist Tiles provide customers an easy and intuitive access to certain PeopleTools delivered configuration items.

PeopleTools 8.58 includes these seven tile definitions:

- Manage Dashboard Pages Tile
- Activity Guide Tile (Nav Collection)
- Notifications (Nav Collection)
- Pivot Grid (Nav Collection)
- Related Content Service (Nav Collection)
- Navigation Collections Tile
- Tile Wizard Tile
Branding changes to support updated style sheet

- Updated style sheets are applied to branding theme “DEFAULT_THEME_FLUID” and Theme Style Type “Classic Plus”
- A new branding theme “PS_REVERT_TO_PRE858” and Theme Style Type “Classic Plus Pre 858” is delivered to revert the style sheet to pre-8.58 one.

All Remaining PeopleTools pages (828) are enabled Classic Plus in PeopleTools 8.58
People Tools - Notifications

Arokiar Rajasekar
Director, PeopleTools Integration & Reporting
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Notification Features - traditional

• Type of Notifications
  • Worklist
  • Email

• Worklist is accessible only from PIA

• Email is an offline notification with a link to worklist
Notification Features - traditional

- Type of Notifications
  - AWE
  - TBE
  - SendMail
  - MCFOutboundEmail
Push Notification Framework - 8.54

- Updates UI with real-time notifications when a pre-defined Event is triggered
- Define Event or Event Collection
- Subscribe to the Event/Event Collection
- Publish an Event
- Provides an option to give real-time notification for Worklist
Notification Window

• A framework to publish real-time alerts to user browser is provided through Publish To Window Framework

• Worklist is accessible only when user navigates to the page. Requires constant monitoring.

• In 8.54, Publish To Window is implemented for TriggerBusinessEvent, giving users real-time alerts when a worklist is created
### Category Name
- PTPG_THRESHOLD_NOTIF (1)
- Treasury Deals Approval (4)
- Approve Treasury Settlements (3)
- Field Request Approval Process (2)
- Treasury Deal confirmation (2)
- BROADCAST (1)
- Customer Statement generation (1)
- GL Journal Approval Process (1)

### Category Type
- Actions (10)
- Alerts (10)

### Message State
- Unread (11)
- Dismissed (11)

### Priority
- Unread (9)

### View All Notifications

<table>
<thead>
<tr>
<th>Notification Name</th>
<th>Category Type</th>
<th>Message</th>
<th>Message State</th>
<th>Last Update Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTPG_THRESHOLD_NOTIF</td>
<td>Alerts</td>
<td>1 rows matching threshold criteria for Display Paid Amount (Payment Spend Analysis)</td>
<td>Unread</td>
<td>01/23/2020 2:35:16AM</td>
</tr>
<tr>
<td>Customer Statement generation</td>
<td>Alerts</td>
<td>A new statement is available for Alliance Group.</td>
<td>Dismissed</td>
<td>07/14/2017 4:01:03AM</td>
</tr>
<tr>
<td>Treasury Deal confirmation</td>
<td>Actions</td>
<td>Deal 000000000376 is awaiting your confirmation</td>
<td>Unread</td>
<td>03/13/2017 8:45:52AM</td>
</tr>
<tr>
<td>Treasury Deals Approval</td>
<td>Actions</td>
<td>Deal '000000000376' is awaiting your approval</td>
<td>Unread</td>
<td>03/13/2017 8:45:40AM</td>
</tr>
<tr>
<td>Treasury Deal confirmation</td>
<td>Actions</td>
<td>Deal 000000000375 is awaiting your confirmation</td>
<td>Unread</td>
<td>03/13/2017 8:40:32AM</td>
</tr>
<tr>
<td>Treasury Deals Approval</td>
<td>Actions</td>
<td>Deal '000000000375' is awaiting your approval</td>
<td>Unread</td>
<td>03/13/2017 8:40:26AM</td>
</tr>
<tr>
<td>Field Request Approval Process</td>
<td>Alerts</td>
<td>Field Request 0000000005 has been approved.</td>
<td>Dismissed</td>
<td>03/08/2017 11:40:05AM</td>
</tr>
<tr>
<td>Field Request Approval Process</td>
<td>Alerts</td>
<td>Field Request 0000000003 has been denied.</td>
<td>Dismissed</td>
<td>03/08/2017 11:17:01AM</td>
</tr>
<tr>
<td>Treasury Deals Approval</td>
<td>Actions</td>
<td>Deal 'MAP2' is awaiting your approval</td>
<td>Unread</td>
<td>05/29/2016 11:53:16AM</td>
</tr>
<tr>
<td>Treasury Deals Approval</td>
<td>Actions</td>
<td>Deal 'MAP1' is awaiting your approval</td>
<td>Unread</td>
<td>05/29/2016 11:49:12AM</td>
</tr>
<tr>
<td>Approve Treasury Settlements</td>
<td>Actions</td>
<td>'EFT Requests' with Source ID 'MAP_EFT_EFT' is awaiting your approval</td>
<td>Unread</td>
<td>05/29/2015 11:36:22AM</td>
</tr>
</tbody>
</table>
Two panel Action View

### Job Offer Information

- **Applicant**: Milicent Forbes
- **Applicant ID**: 800136
- **Job Posting Title**: Manager-Procurement
- **Offer Date**: 03/22/2017
- **Offer Expiration Date**: 04/01/2017
- **Recruiter**: Emmyyou Dell
- **Hiring Manager**: John Patterson

### Additional Information

- **Job Type**: Standard Requisition
- **Job Family**: Accounting - KACC
- **Company**: Global Business Institute - GBI
- **Job Code**: Manager-Procurement - 600160
- **Position Number**: Business Unit - Global Business Institute BU - GIBI

### Job Offer

<table>
<thead>
<tr>
<th>Component</th>
<th>Frequency</th>
<th>Offer Amount</th>
<th>Payment Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Salary</td>
<td>Monthly</td>
<td>4,560.00 USD</td>
<td>Cash</td>
</tr>
<tr>
<td>Annual Bonus</td>
<td>Annual</td>
<td>6,000.00 USD</td>
<td>Cash</td>
</tr>
</tbody>
</table>

### View Job Offer

- **Approver Comments**

- **Approval Chain**
Publish Code

ComponentLife PTPN_PUBLISH:PublishToWindow &wlSrch;
&msginfo = PTPN_BROADCAST.PTPN_BC_MSG.Value;
&wlsrch = create PTPN_PUBLISH:PublishToWindow("SENDNOTE", "BROADCAST");
&wlsrch.AddRecepient(&user, 1);
&wlsrch.SetCategoryAlias("BROADCAST");
&wlsrch.SetMsgInfo(&msginfo);
&wlsrch.SetCategoryTypeFyi();
&wlsrch.SetMsgStateNew();
&wlsrch.SetMsgKey(GenerateRandomDataKey());
&wlsrch.Publish(""
Text Messaging - 8.58

- Text messaging is available as one of the notification option under Notification Configuration

- URL identifier ‘PTTEXTMESSAGING’ is delivered to configure Twilio account for text messaging support

- User phone number must be provided under Notifications section available at ‘My Preferences’ -> ‘General Settings’, to receive text messages

- The phone number should be in E.164 format (+<Country Code><Area Code><Phone Number>)
Text Messaging

URL Maintenance

URL Identifier: PTTEXTMESSAGING
*Description: URL ID for text messaging
*URLID: https://api.twilio.com/2010-04-01/Accounts/A
Comments: https://api.twilio.com/2010-04-01/Accounts/A

![URL Properties](URL Properties)

- **ACCOUNTID**: ACF3456b5107d983bed8d97
- **ACCESSSTOKEN**: 7FypzuP#r9rS#RbQ#-4uMilZ1KcUgq
- **TEXTFROM**: +16122229290

*Password Encryption*
Text Messaging
Notification Configuration - 8.58

• ‘Notification Configuration’ component to control the notification types to be received by users

• Any applications using Push Notification framework through PTPN_PUBLISH application package get the feature just by configuring notification with the existing ‘Category Name’ and ‘Event Name’

• Administrator can configure a default notification type, allow users to personalize or restrict users from disabling all channels
## Notification Configuration

PeopleTools -> Push Notifications -> Notification Window -> Notification Configuration

![Notification Configuration](image)

### View Notification Configuration

<table>
<thead>
<tr>
<th>Notification Name</th>
<th>Event Name</th>
<th>Description</th>
<th>Owner ID</th>
<th>Functional Category</th>
<th>Push</th>
<th>Email</th>
<th>Text</th>
<th>Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGThresholds</td>
<td>PTPG_THRESHOLD_NOTIF</td>
<td>Personalized Analytic Notifications</td>
<td>PT</td>
<td>Pivot Grid</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>TriggerBusinessEvent</td>
<td>TRIGGERBUSINESSEVENT</td>
<td>Trigger Business Event</td>
<td>PT</td>
<td>Workflow</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>BROADCAST</td>
<td>SENDNOTE</td>
<td>Broadcast Notifications</td>
<td>PT</td>
<td>Notifications</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>
Notification Configuration

- **Unique identifier (Same as Category Name earlier)**
- **Event Name as registered with PUSHTOWINDOWCOLLECTION**
- **Enable this to disallow users from disabling all the channels**
- **Channels available for users. Pre-configurations may be required**
- **Users get a notification by default in the selected channel**
- **Enable to allow users to opt for different channels**
- **Chose the Permission List/Role of users who can personalize. Empty grid enables it for all**
User Personalization
TriggerBusinessEvent – Manage Notifications

PeopleTools -> Push notifications -> Notification Window -> Configuration -> System Configuration

• ‘TRIGGERBUSINESSEVENT’ is a pre-delivered notification configuration used for all the TBE notifications

• Configuration for an individual event can be changed by using ‘Notification Configuration Override’ option

• A notification configuration used to override, must be mapped with Event – TRIGGERBUSINESSEVENT
TriggerBusinessEvent – Manage Notifications

PeopleTools -> Push notifications -> Notification Window -> Configuration -> System Configuration

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Activity</th>
<th>Event</th>
<th>Worklist</th>
<th>Priority</th>
<th>Enable</th>
<th>Notification Message Set Number</th>
<th>Notification Text Message Number</th>
<th>Notification Category Message Set Number</th>
<th>Notification Category Message Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>No</td>
<td>127</td>
<td>4</td>
<td>127</td>
<td>3</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>Yes</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>0</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>Yes</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>0</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>No</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>0</td>
</tr>
<tr>
<td>GE_ACTIVITY_GUIDE_DEMO</td>
<td>GE_ACTIVITY_GUIDE_START</td>
<td>ACTIVITY_GUIDE_WORKLIST</td>
<td>Activity Guide Demo</td>
<td>Default</td>
<td>No</td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>0</td>
</tr>
</tbody>
</table>
## Notification Configuration

**Notification Category:** RecycleTest

**Event Name:** TRIGGERBUSINESSEVENT

**Description:** Recycle Order

**Functional Group:** Workflow

**Object Owner ID:** PeopleTools Demo

**Mandatory:** No

### Notification Options

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>Available</th>
<th>Enable By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Push</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Email</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Text</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

### Personalization Settings

**Allow Personalization:** Yes

### Authorized Roles and Permission Lists

**Type of Authorization:**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role/Permission List</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Manage Notification

**TriggerBusinessEvent**
- Yes

**Object Owner ID**
- [Dropdown]

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Activity</th>
<th>Event</th>
<th>Worklist</th>
<th>Priority</th>
<th>Enable</th>
<th>Notification Configuration Override</th>
<th>Notification Text Message Set Number</th>
<th>Notification Text Message Number</th>
<th>Notification Category Message Set Number</th>
<th>Notification Category Message Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>No</td>
<td>No</td>
<td>137</td>
<td>4</td>
<td>137</td>
<td>3</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_VA_TEST</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>Yes</td>
<td></td>
<td>158</td>
<td>2</td>
<td>158</td>
<td>9</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Recycle Order</td>
<td>Recycle</td>
<td>Default</td>
<td>Yes</td>
<td>RecycleTest</td>
<td>137</td>
<td>4</td>
<td>137</td>
<td>3</td>
</tr>
<tr>
<td>GE_PROCESS_ORDERS</td>
<td>GE_APPROVE_ORDER</td>
<td>Approve Order</td>
<td>Supervisor</td>
<td>Default</td>
<td>No</td>
<td>No</td>
<td>137</td>
<td>4</td>
<td>137</td>
<td>3</td>
</tr>
<tr>
<td>GE_ACTIVITY_GUIDE_DEMO GE_ACTIVITY_GUIDE_START</td>
<td>ACTIVITY_GUIDE_WORKLIST</td>
<td>Activity Guide Demo</td>
<td>Default</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>137</td>
<td>4</td>
<td>137</td>
<td>3</td>
</tr>
</tbody>
</table>
Personalized Analytic Notifications

- Pivot Grids can be personalized to send notifications based on a threshold criteria
- All Personalized Analytic Notifications use the pre-delivered ‘PGThresholds’ notification configuration
- A Pivot Grid view allows user to either enable or disable all notifications for it
### Notifications

#### Display Settings

Notification items to display

#### Notification List

<table>
<thead>
<tr>
<th>Notification Name</th>
<th>Description</th>
<th>Notification Window</th>
<th>Email Notification</th>
<th>Text Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PGThresholds</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>Approvals</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>3</td>
<td>BROADCAST</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
1 rows matching threshold criteria for Display Paid Amount (Payment Spend Analysis) for VP1
Page=PTPG_NUL_VWR&PG_NAME=PO_SPEND_FL_PAID_PVG&VIEWNAME=PO_SPEND_FL_PAID_PVG.View
Broadcast

- Support for Bulk Notifications
- Selection by Role or User Id
- Notification channels can be configured
- Meta-variables for personalized messages
Hi Allan Martin,

This is to inform you that your profile update is pending for past 10 days.

Thanks
Hi A Lee, This is to inform you that your profile update is pending due for past 10 days. Thanks.
Other 8.58 features

- Notification
  - Archive and Purge needs Message State/inactive choice
  - Ability to send Broadcast Notifications to large groups of users
Other 8.58 features

- Pivot Grids
  - Pivot Grid – Threshold Improvements
  - Ability to format non-currency fields to Display 1000 separator
  - Facet category UX
  - Expand/Collapse/Invisible configuration
  - Sequencing of facet categories
  - Ability to export current Pivot Grid view
  - Ability to define order or sequence values on X-Axis
Other 8.58 features

- **Application Services Framework (Chatbot)**
  - File Processing – Attachment support for Chat bot application
  - OAuth2 uptake for Application Service Framework

- **Process Scheduler**
  - SetEmailOption have an option to add "From" email address
  - Run Control ID Management
Thank you
ORACLE