PeopleSoft

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DIVE DEEP

Get PeopleSoft Chatbots Production Ready In 5 Simple Steps

Presented by:

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Session ID

100180

- Over 17 years of consulting and management experience in Oracle PeopleSoft HCM, Talent, Workforce Management and Finance business functions.
- Specialize in strategy, planning and execution of large scale implementations, upgrade and transformation projects.

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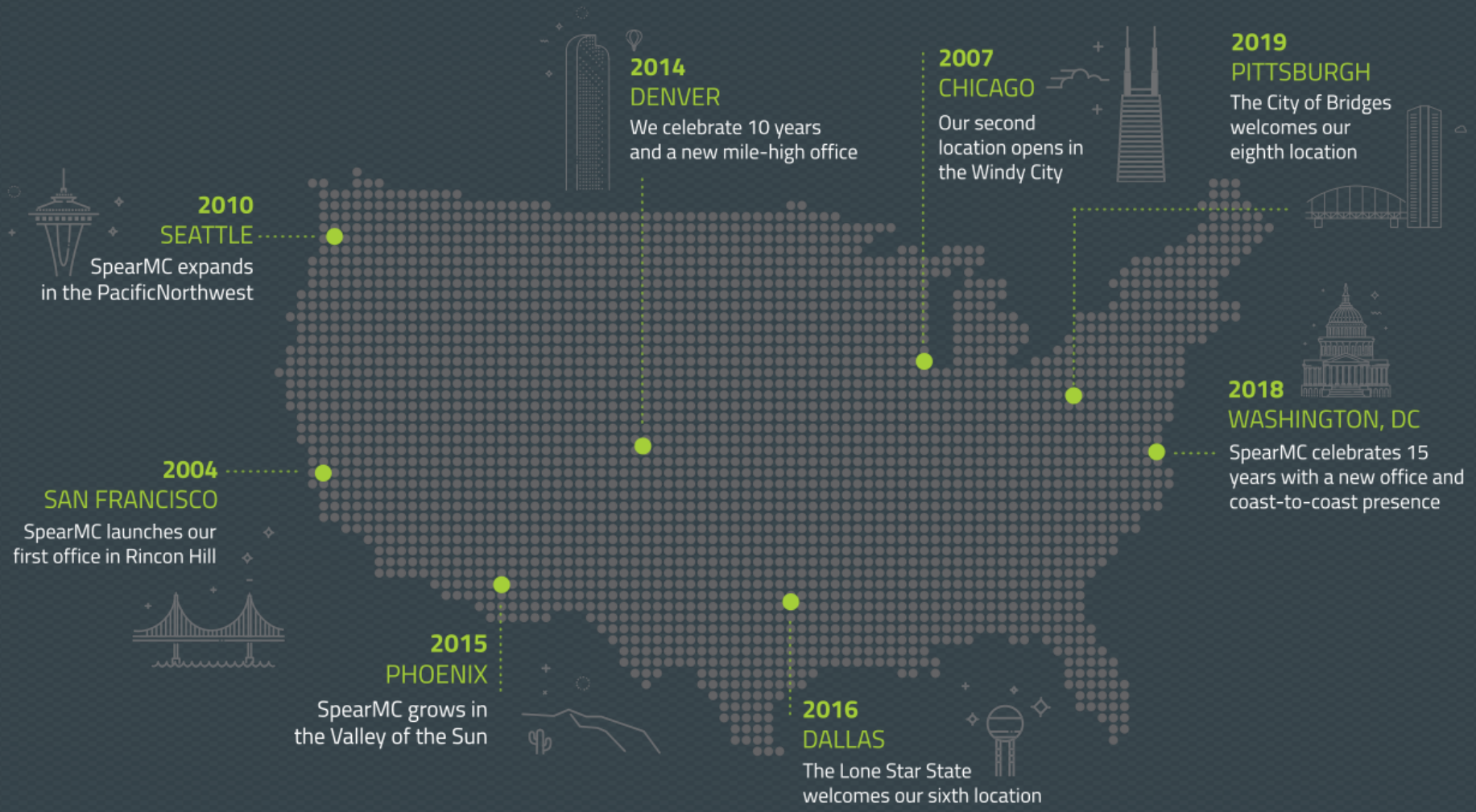
Coast-to-Coast Coverage



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About SpearMC

- Finance
- Supply Chain
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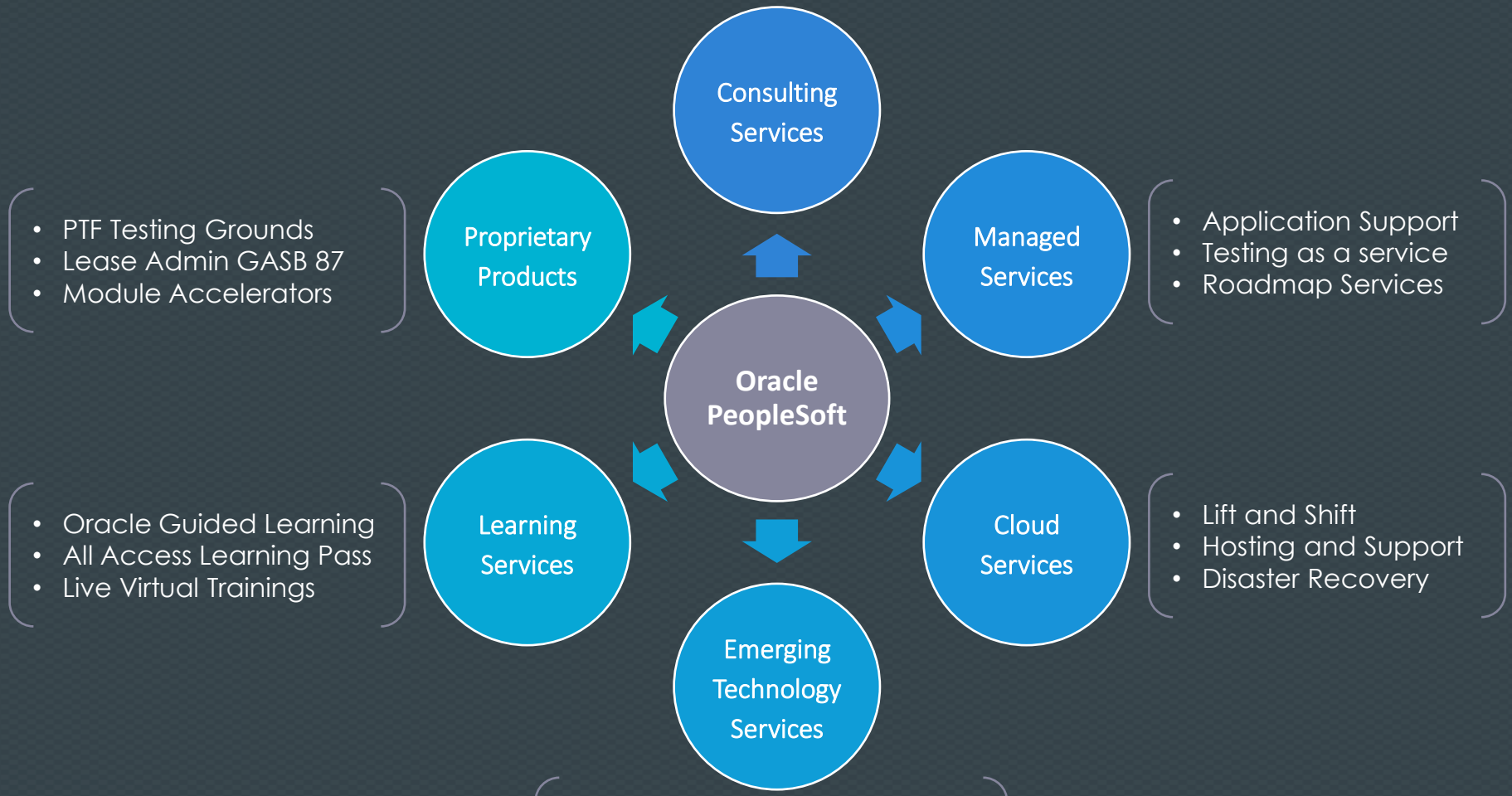
- Campus Solutions



- PTF Testing Grounds
- Lease Admin GASB 87
- Module Accelerators

- Application Support
- Testing as a service
- Roadmap Services

- Oracle Guided Learning
- All Access Learning Pass
- Live Virtual Trainings

- Lift and Shift
- Hosting and Support
- Disaster Recovery

- Elastic, Logstash, Kibana
- Chatbots and Digital Assistants

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Agenda

- PeopleSoft Digital Assistant (PICASO) Demo
- Chatbots Value Proposition
- Chatbot Deployment Process
- Getting Chatbots Production Ready in 5 Steps
- Q & A

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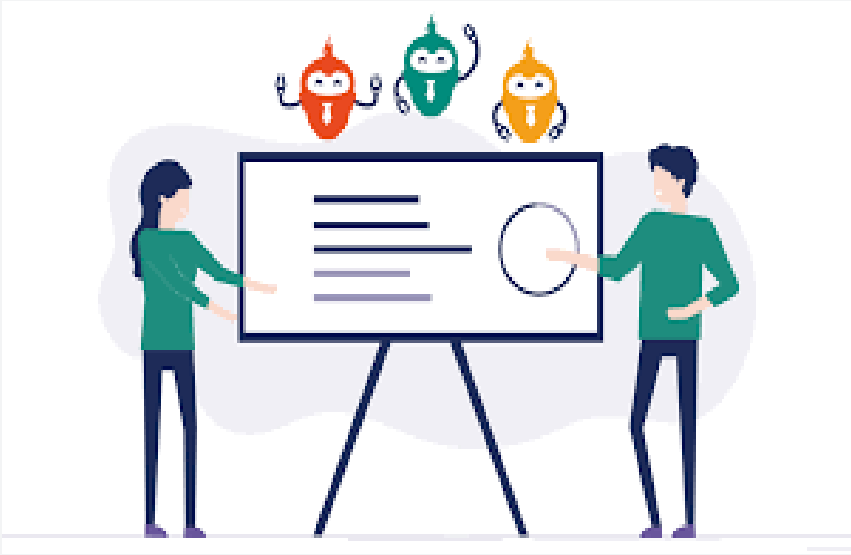
Online Demo

- PeopleSoft Digital Assistant (PICASO)



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Chatbots Value Proposition

User Experience

- Interactive, engaging user experience, significantly improves user satisfaction thru positive feedback
- Single channel to accomplish multiple related tasks
- No need to know/remember system navigations

Training

- Natural conversational UI can cut down user training when rolling out new features

On-demand Assistance

- Question and Answer (FAQ) offers a virtual helpdesk capability reducing HR call volumes

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PeopleSoft Chatbots – Current State

Absence	Benefits	Directory	Payroll	Recruiting	Expenses	Requisition
AbsenceBalance	AdminContactInfo	View profile	Paychecks	ApplicationStatus	Last 5 Reports	Item Description Status
CancelAbsence	DependentBeneficiary	View manager	Bank account information	Submitting Applications	Get Name	Item ID Status
FutureBalance	LifeEventInfo	View direct reports	Employee's withholding	SavedSearches	Get Transaction Details	Search Requisitions
Submit RequestAbsence	OpenEnrollmentInfo	View phone number	Voluntary deductions	SearchJobs	Search Reports	Requisition Status
Review AbsenceRequest	PlanCost	View job code or position	Pay schedules	General Questions	Send Notifications	
	PlanDetail	View contact details	Year-end forms	ContactUs		
	PlanProvider	View email address	Garnishments	WhatCanYouDo		
	BenefitSummary		Contact information	AppNotification		
				Announcement		

System Requirements

- PeopleSoft HCM Update Image 9.2.031+
- PeopleSoft FSCM Update Image 9.2.033+
- PeopleSoft ELM Update Image 9.2.020+
- PeopleSoft CRM Update Image 9.2.018+
- PeopleTools version is 8.57.07+

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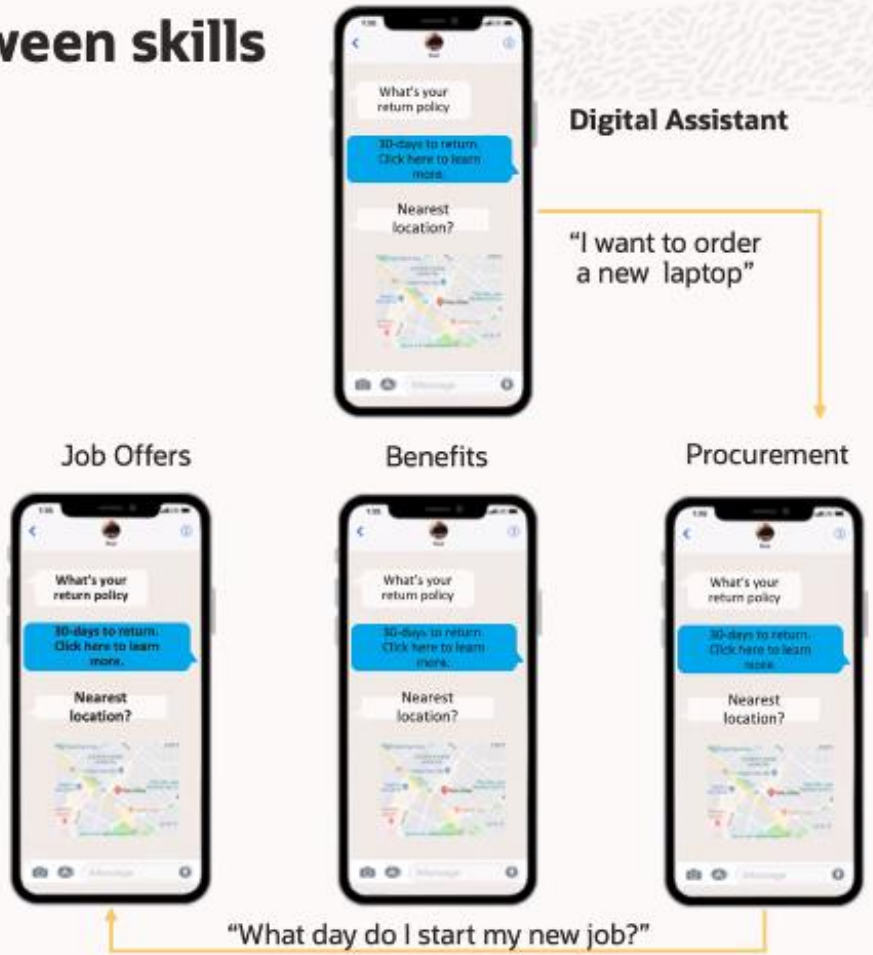
PeopleSoft Digital Assistant

Seamless routing between skills

Digital Assistant routes requests to the right skill bots:

- Explicit routing – "Ask Banking Bot my savings balance"
- Implicit routing – "What's my savings balance?"



Skill benefits

- Modularize functions
- Enable incremental development
- Simplify code management
- Improve non-sequitur handling
- Simplify versioning and LCM
- Enable segmented authorization

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FAQ on Delivered Chatbots

- Functional modular chatbots
- Need ODA Subscription
- No additional PeopleSoft licenses
- No additional servers or infrastructure requirements
- Simple installation process, setup time less than a day
- Accessed from within PeopleSoft application (default channel)
- Uses existing security framework
- Delivered tool kit to build new bots and extend delivered bots

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Deployment Process

PeopleSoft Setup

- Deploy WebSDK for PIA
- Setup Bot User
- Update IB Operations
- Update Firewall Rules
- Configure Chatbot Channel

ODA Setup

- Setup ODA Account
- Download and Clone Skill
- Update Connection Parameters
- Create Channel
- Train and Deploy

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Getting PeopleSoft Chatbots Production Ready

Chatbot Glossary

Channels

Utterances

Prompt for related information or tasks.

AI/ML to train chatbots to decipher user questions.

Prompt

NLP

Chatbot (Skill)

Provide info or update backend system.

What user wants to achieve?

Respond

Intent

Entities

What info provided or required to action?

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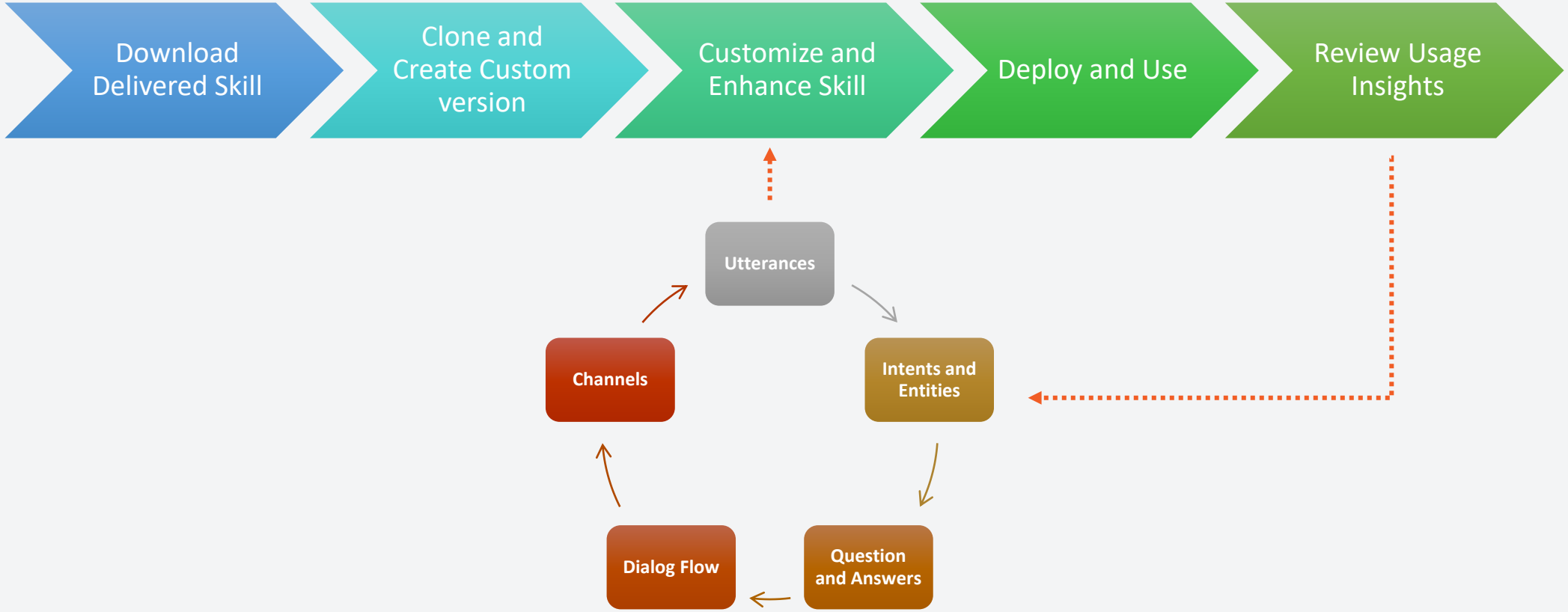
Chatbot Deployment Process



Getting Chatbots Production Ready

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1. Utterances
   - Different ways user say or ask for things
     - Enhance the delivered list with custom terminologies, additional variations, languages etc.
2. Intents
   - Conveys user's intention (action) to accomplish
     - Extend delivered entities for custom usage
     - Increase the scope of delivered chatbots with additional intents
3. Question and Answers
   - Respond to general interest questions
     - Use Q&A feature to surface FAQs or other knowledge-base documents
4. Dialog Flow
   - Choreograph the interaction between a bot and user
     - Enhance the chatbots with blending custom intents and Q&A feature
5. Channels
   - Gateway for user's interaction with Chatbot
     - Deploy PeopleSoft Chatbots on Channel in addition t to standard "Web Channel"

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1. Working with Utterances

Enhancing Utterances

- Review delivered Intents and Utterances
- Add/Remove/Change utterances for delivered intents
  - ✓Variations in Utterances makes the chatbots flexible
  - ✓Anticipate the way your audience might speak
  - ✓Use different lengths of sentence
  - ✓Mix the grammar up
  - ✓Polarization, Punctuation variations
- Export/import utterance using flat file (Bulk Updates)
- Run Utterance Quality Report
- Add Auto-Complete Suggestions
- Train, Train, Train…

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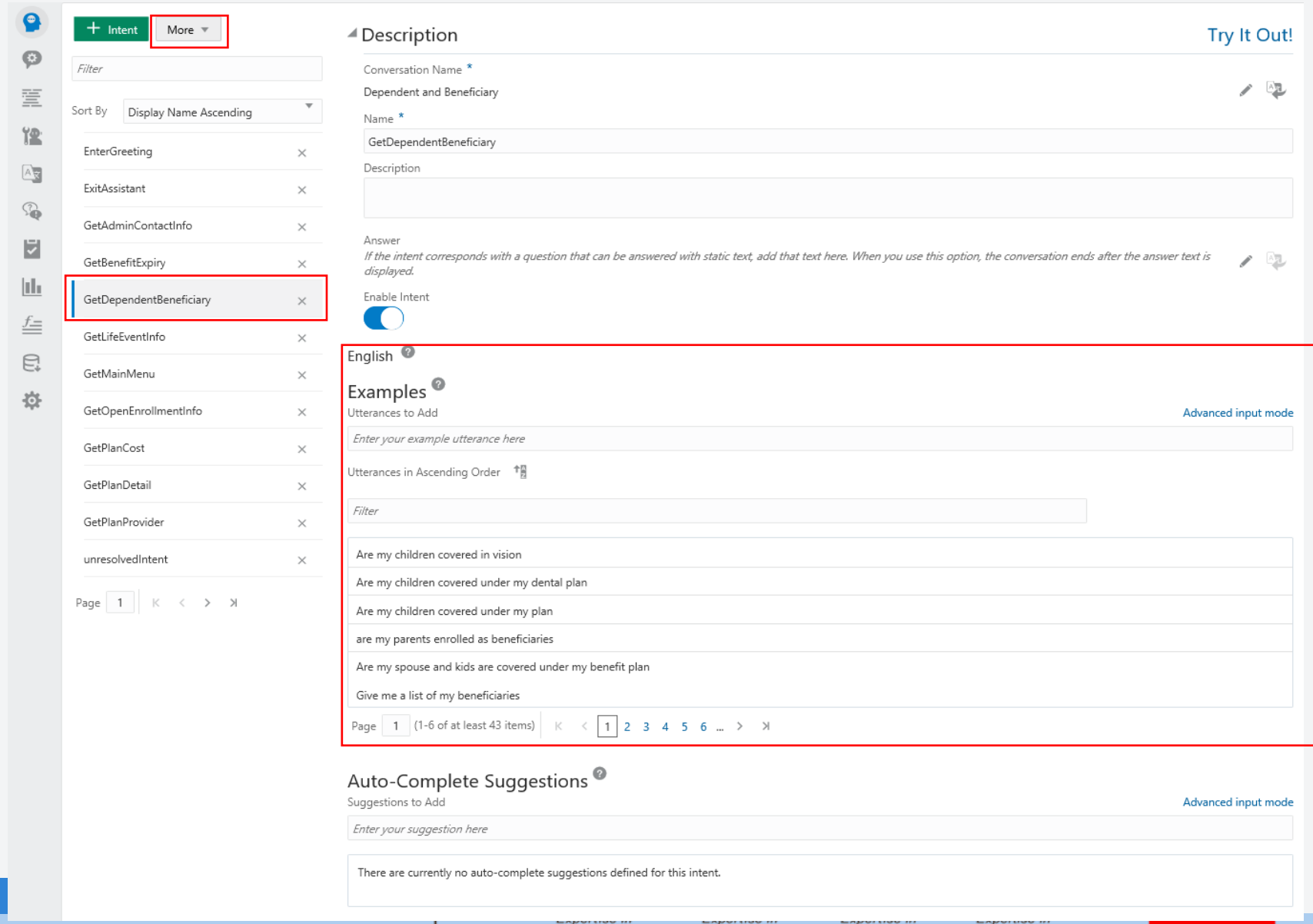
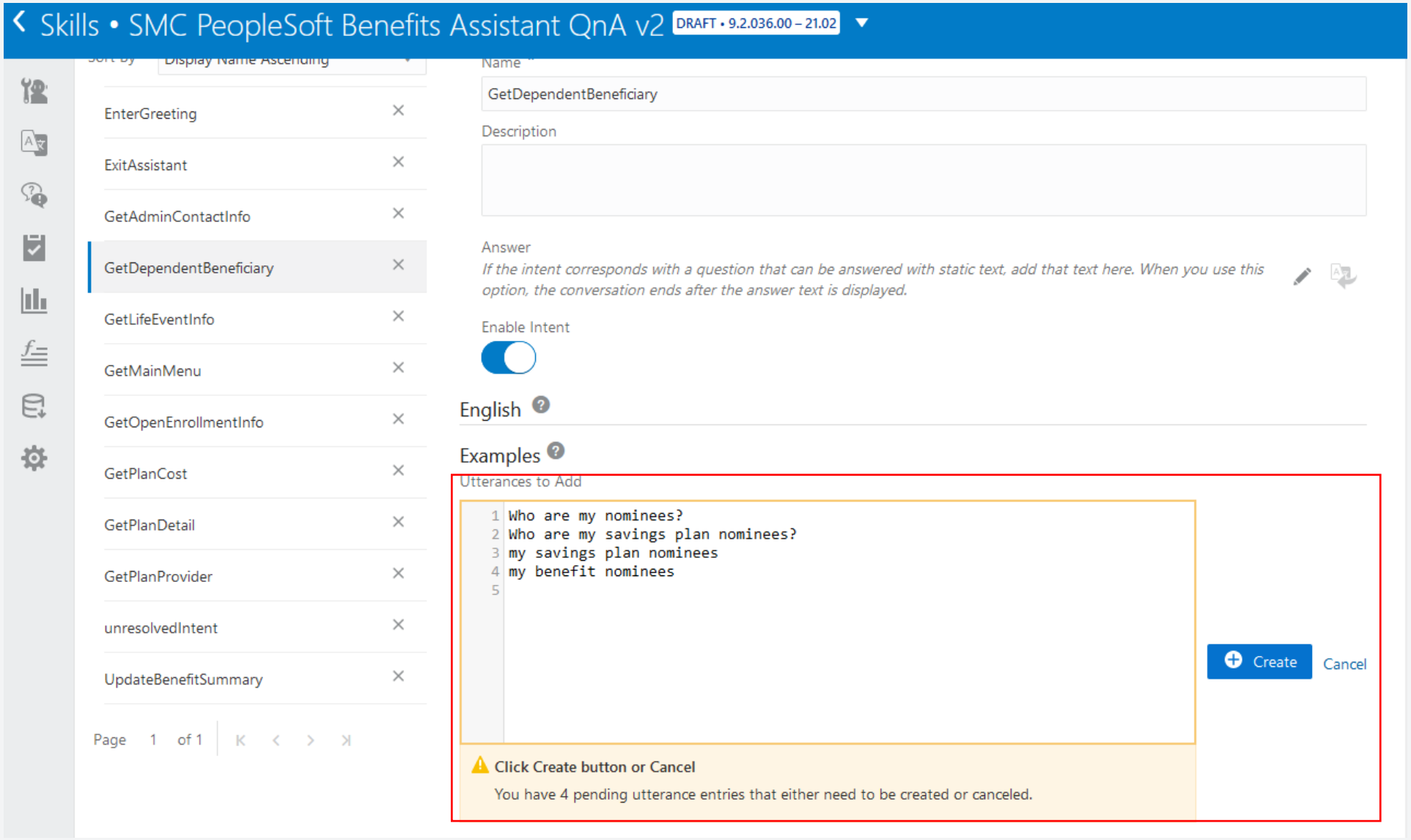
Enhancing Utterances



Enhancing Utterances



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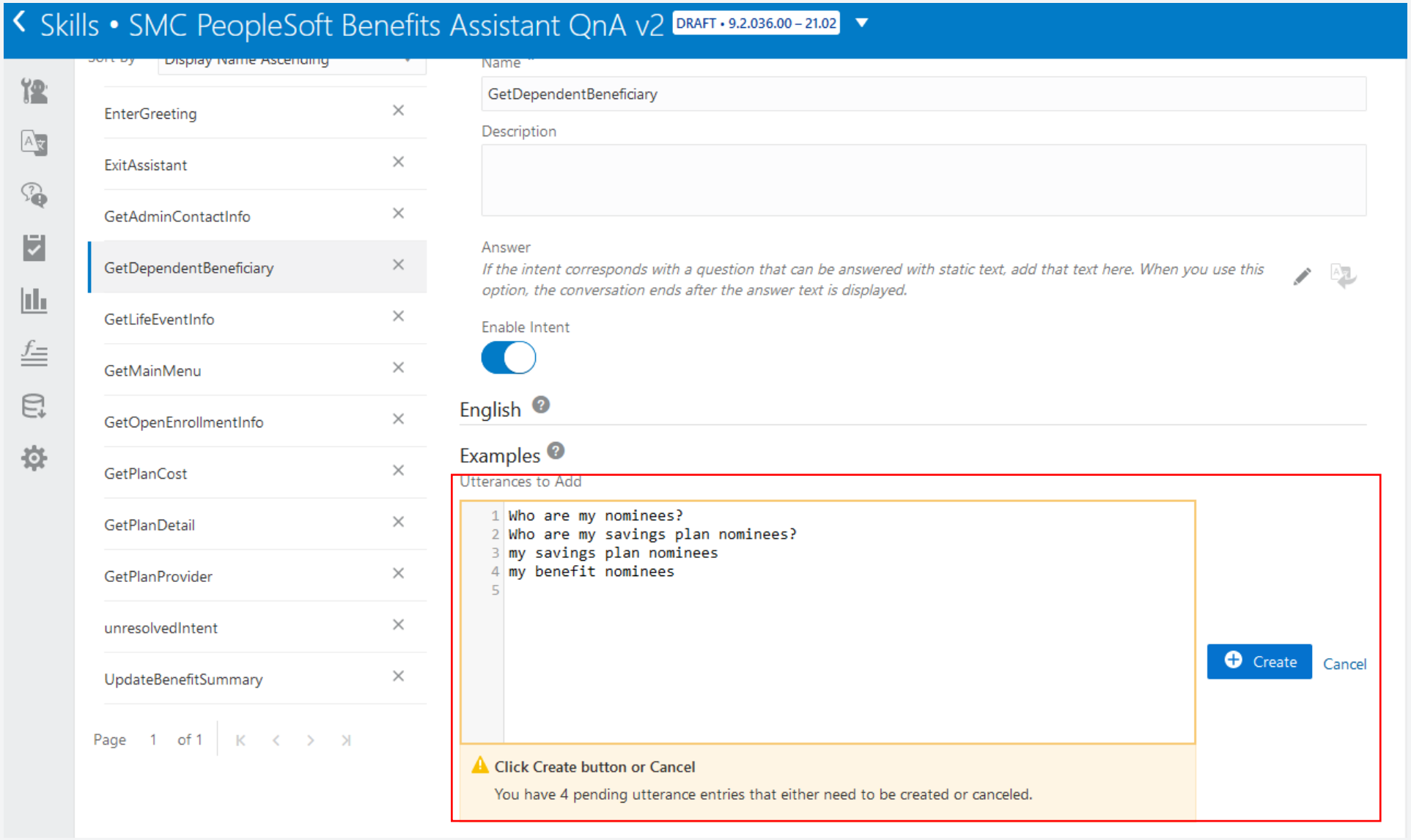
Adding Utterances



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Intent and Utterance – Export/Import

1	query	topIntent	conversationName	answer	enable	nativeLanguageTa
200	How my beneficiaries are allocated	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
201	Who is my beneficiary for my insurance	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
202	Give me a list of my dependents	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
203	list my beneficiary	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
204	Give me a list of my beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
205	Who is my dependent for my benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
206	my beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
207	Are my spouse and kids are covered under my benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
208	Who has been covered in my benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
209	my beneficairies designation	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
210	please tell me details of my dependent and beneficiary	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
211	is my spouse enrolled in life plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
212	are my parents enrolled as beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
213	tell me my dependent and beneficiary	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
214	Tell me my beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
215	Are my children covered under my plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
216	If my children are covered under my plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
217	Is my parent enrolled in benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
218	My Beneficiary Designations	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
219	is my parent enrolled in medical	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
220	Tell me my dependents	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
221	How many beneficiaries have I enrolled	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
222	If my parent is enrolled in my benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
223	who are my beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
224	is my son covered as dependent in medical?	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
225	Are my children covered in vision	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
226	is my child covered as dependent	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
227	is my daughter covered as dependent in vision	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
228	who are covered in my benefit plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
229	is my spouse a beneficiary in life plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
230	Are my children covered under my dental plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
231	my dependents	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
232	Show me my dependents	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
233	show me my dependents and beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
234	list my beneficiaries	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
235	who are my dependents	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
236	Who will be covered on my plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
237	is my spouse covered in dental plan	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en
238	How many dependents I have enrolled	GetDependentBeneficiary	Dependent and Beneficiary		TRUE	en

For bulk updates,

1. Export Intent/Utterance list
2. Make changes in CSV file
3. Upload file to update Intent/Utterance

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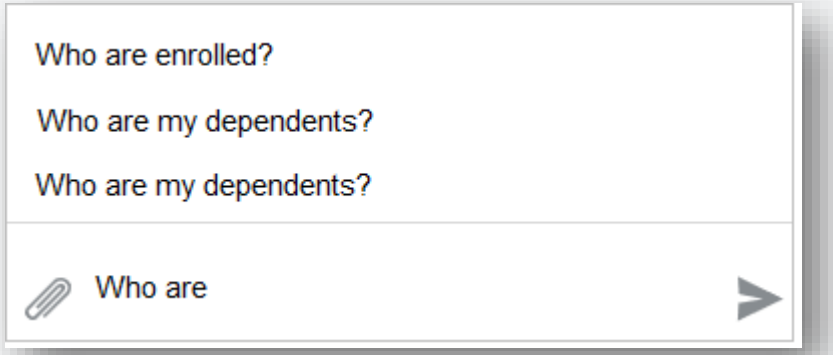
Enable Auto-Complete Suggestions



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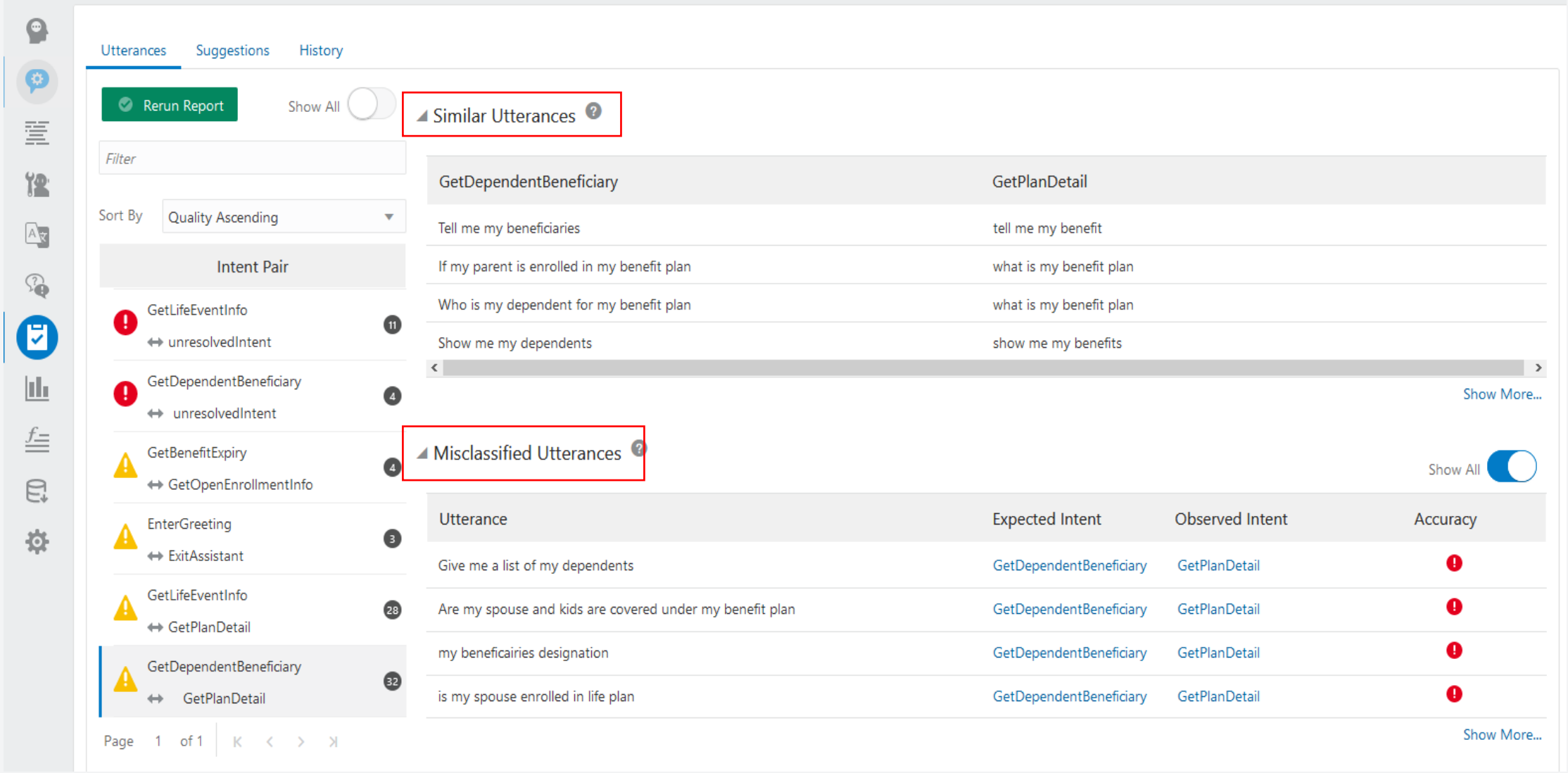
Utterance Quality Report



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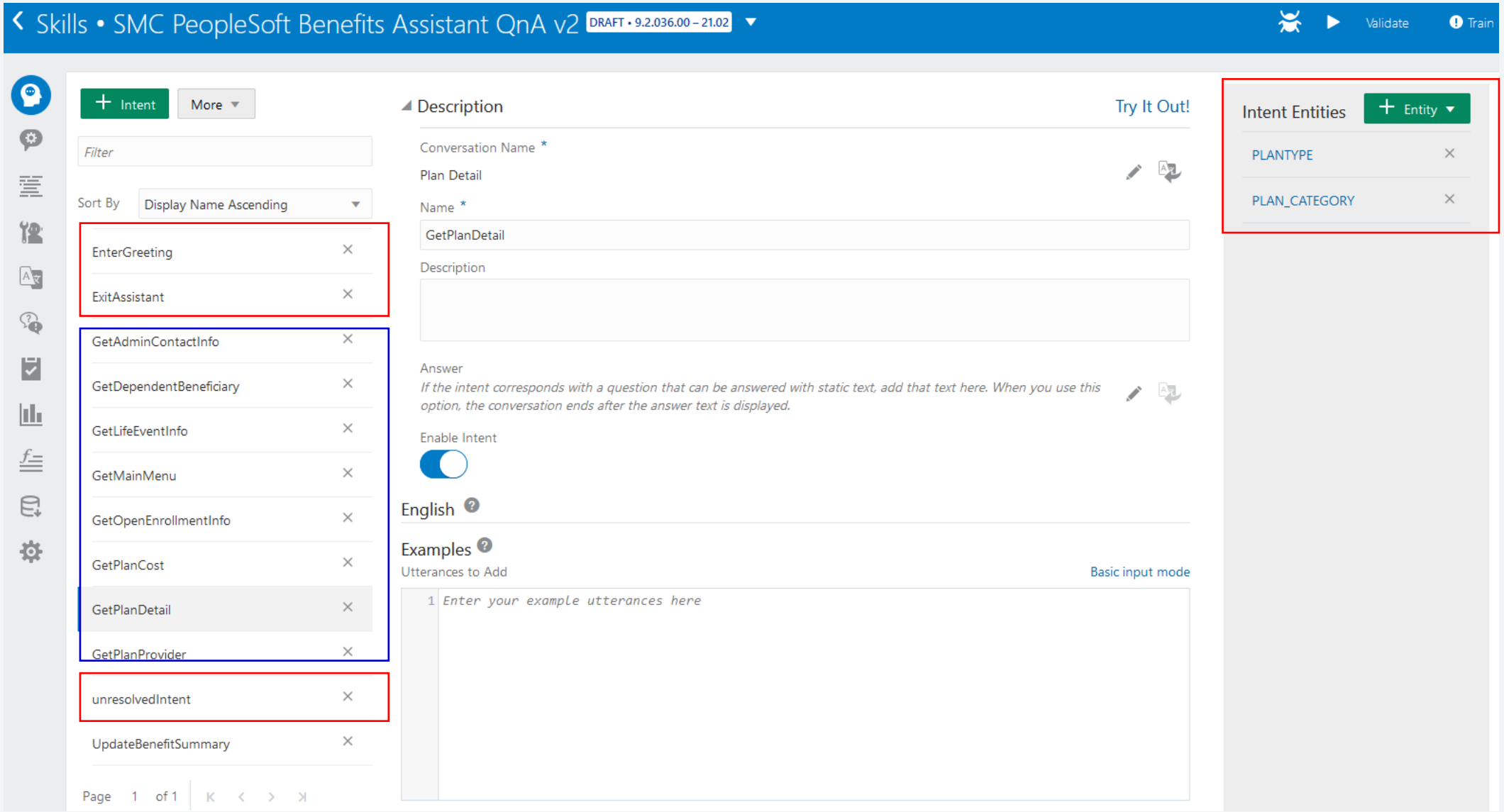
2. Working with Intents and Entities

Delivered Intents and Entities



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Modifying Delivered Entities

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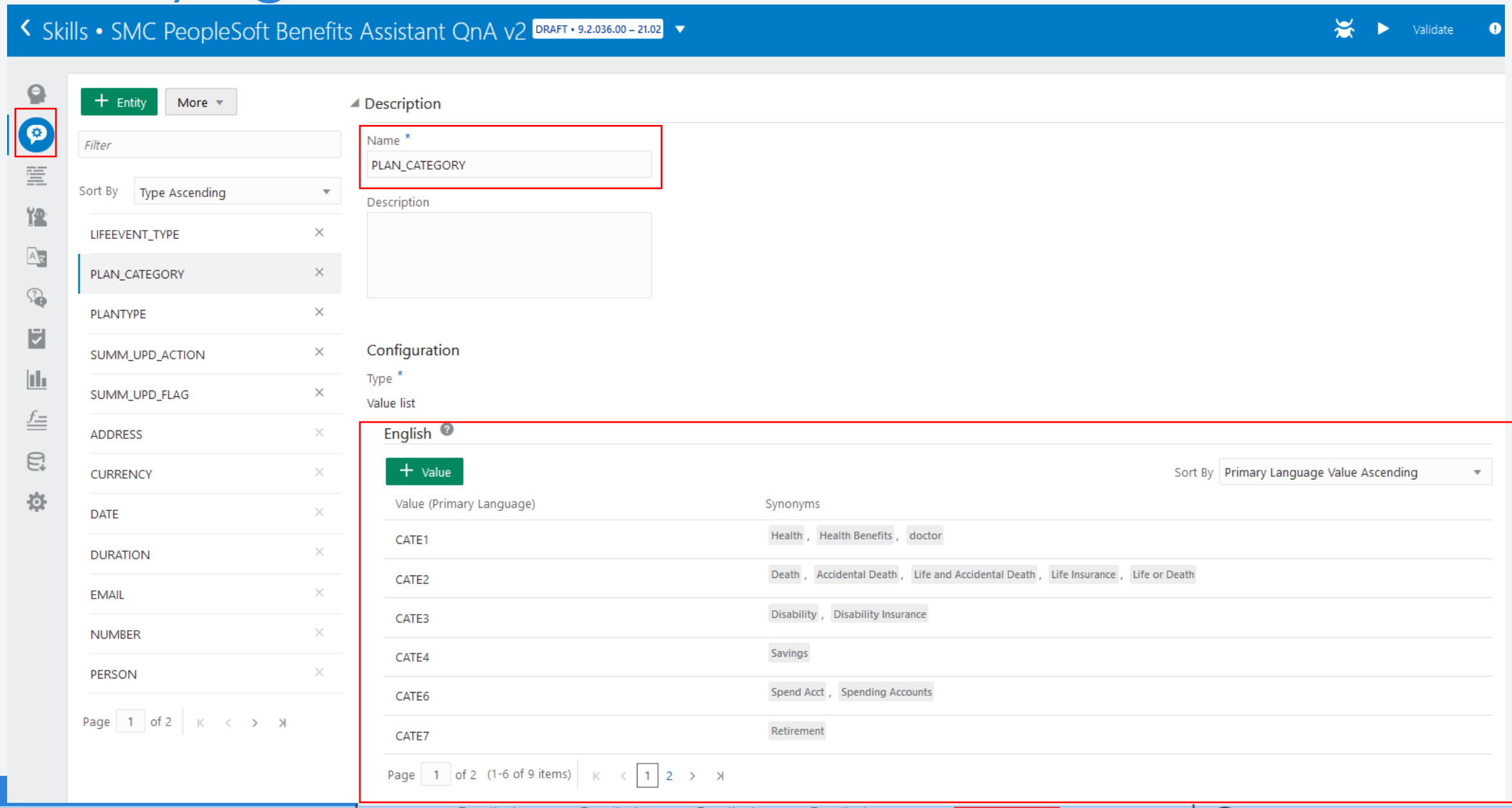

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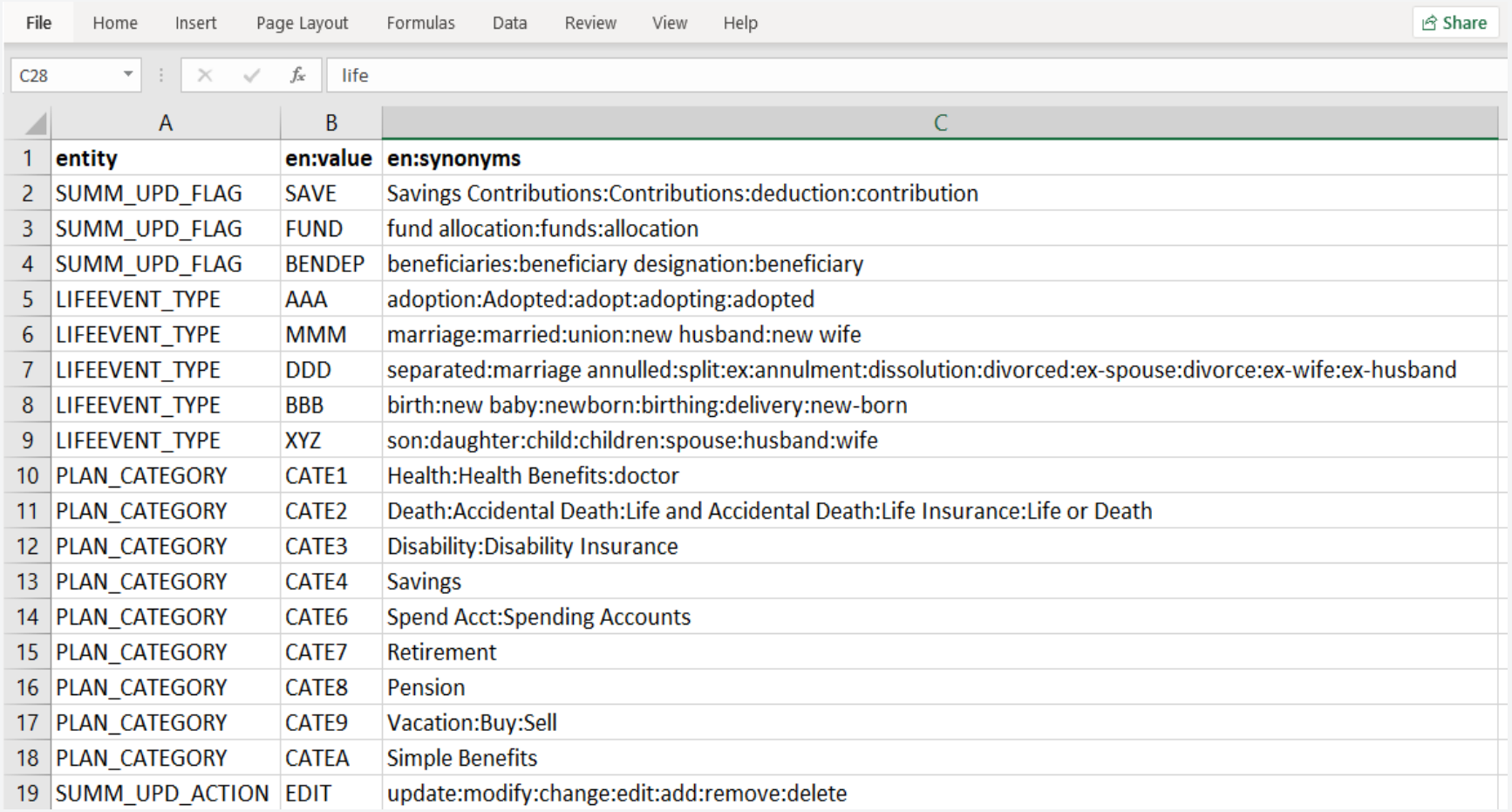
Export/Import Entities



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	A	B	C
1	**entity**	**en:value**	**en:synonyms**
2	SUMM_UPD_FLAG	SAVE	Savings Contributions:Contributions:deduction:contribution
3	SUMM_UPD_FLAG	FUND	fund allocation:funds:allocation
4	SUMM_UPD_FLAG	BENDEP	beneficiaries:beneficiary designation:beneficiary
5	LIFEEVENT_TYPE	AAA	adoption:Adopted:adopt:adopting:adopted
6	LIFEEVENT_TYPE	MMM	marriage:married:union:new husband:new wife
7	LIFEEVENT_TYPE	DDD	separated:marriage annulled:split:ex:annulment:dissolution:divorced:ex-spouse:divorce:ex-wife:ex-husband
8	LIFEEVENT_TYPE	BBB	birth:new baby:newborn:birthing:delivery:new-born
9	LIFEEVENT_TYPE	XYZ	son:daughter:child:children:spouse:husband:wife
10	PLAN_CATEGORY	CATE1	Health:Health Benefits:doctor
11	PLAN_CATEGORY	CATE2	Death:Accidental Death:Life and Accidental Death:Life Insurance:Life or Death
12	PLAN_CATEGORY	CATE3	Disability:Disability Insurance
13	PLAN_CATEGORY	CATE4	Savings
14	PLAN_CATEGORY	CATE6	Spend Acct:Spending Accounts
15	PLAN_CATEGORY	CATE7	Retirement
16	PLAN_CATEGORY	CATE8	Pension
17	PLAN_CATEGORY	CATE9	Vacation:Buy:Sell
18	PLAN_CATEGORY	CATEA	Simple Benefits
19	SUMM_UPD_ACTION	EDIT	update:modify:change:edit:add:remove:delete

For bulk updates,

1. Export Entities list
2. Make changes in CSV file
3. Upload revised file

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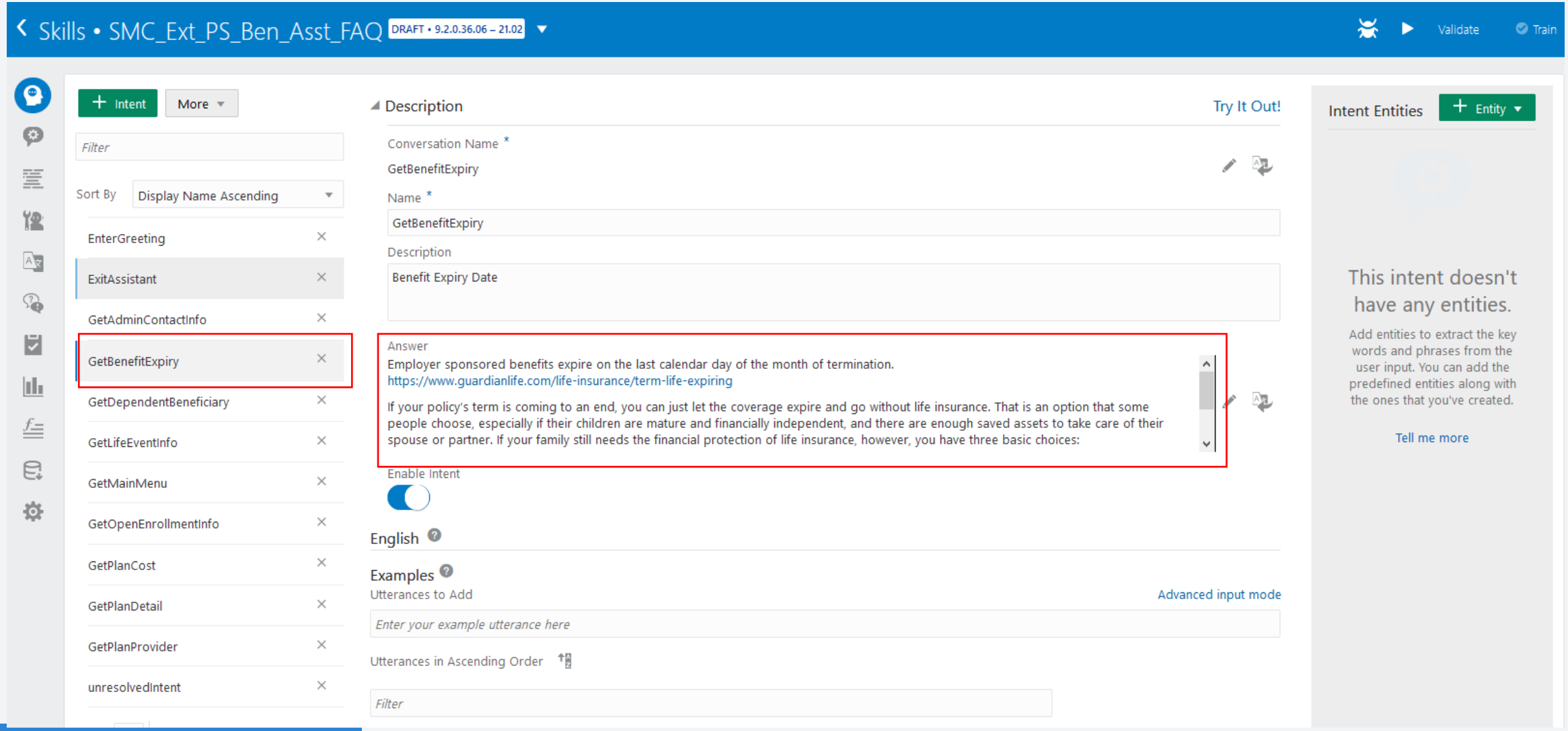
Answer Intent



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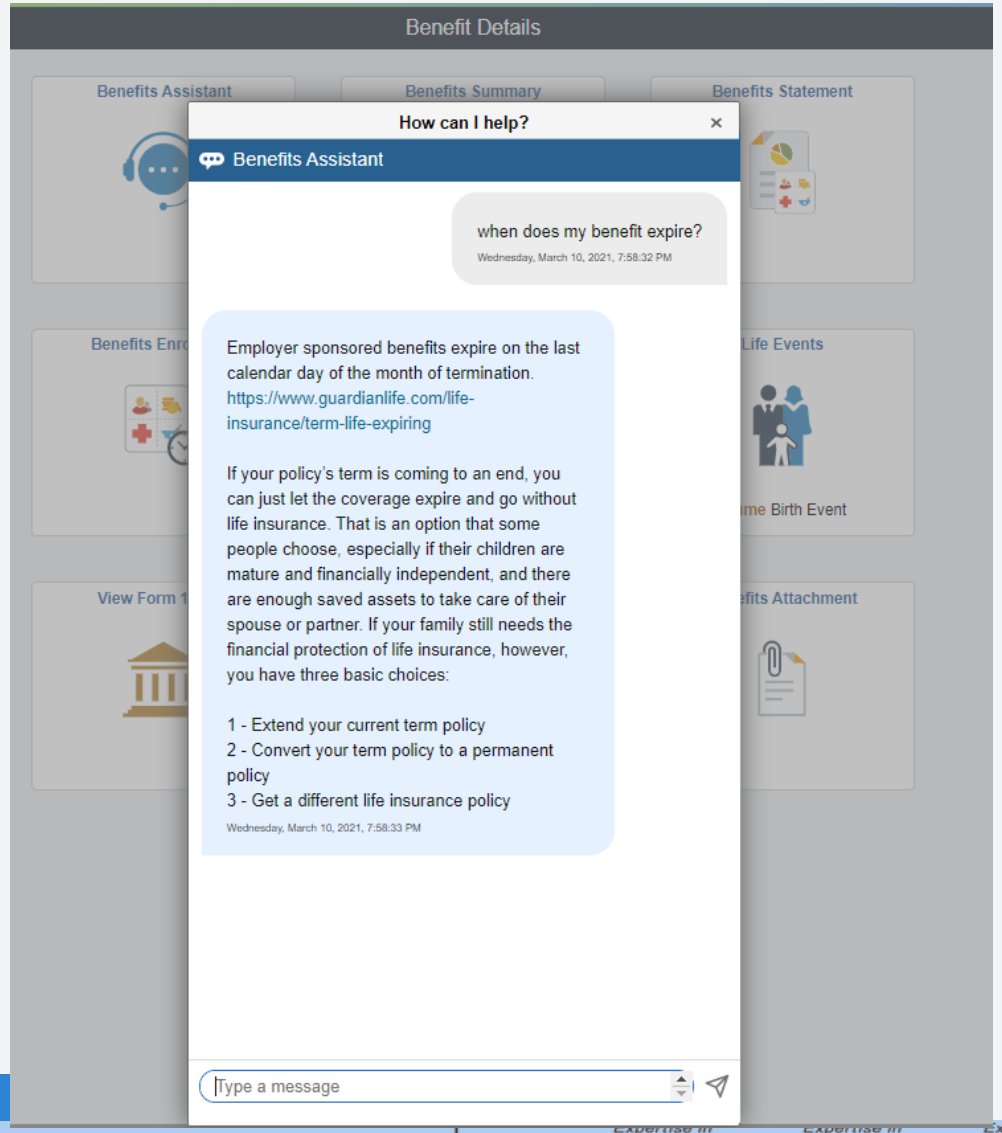
Answer Intent - Example



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3.Working with Question and answers

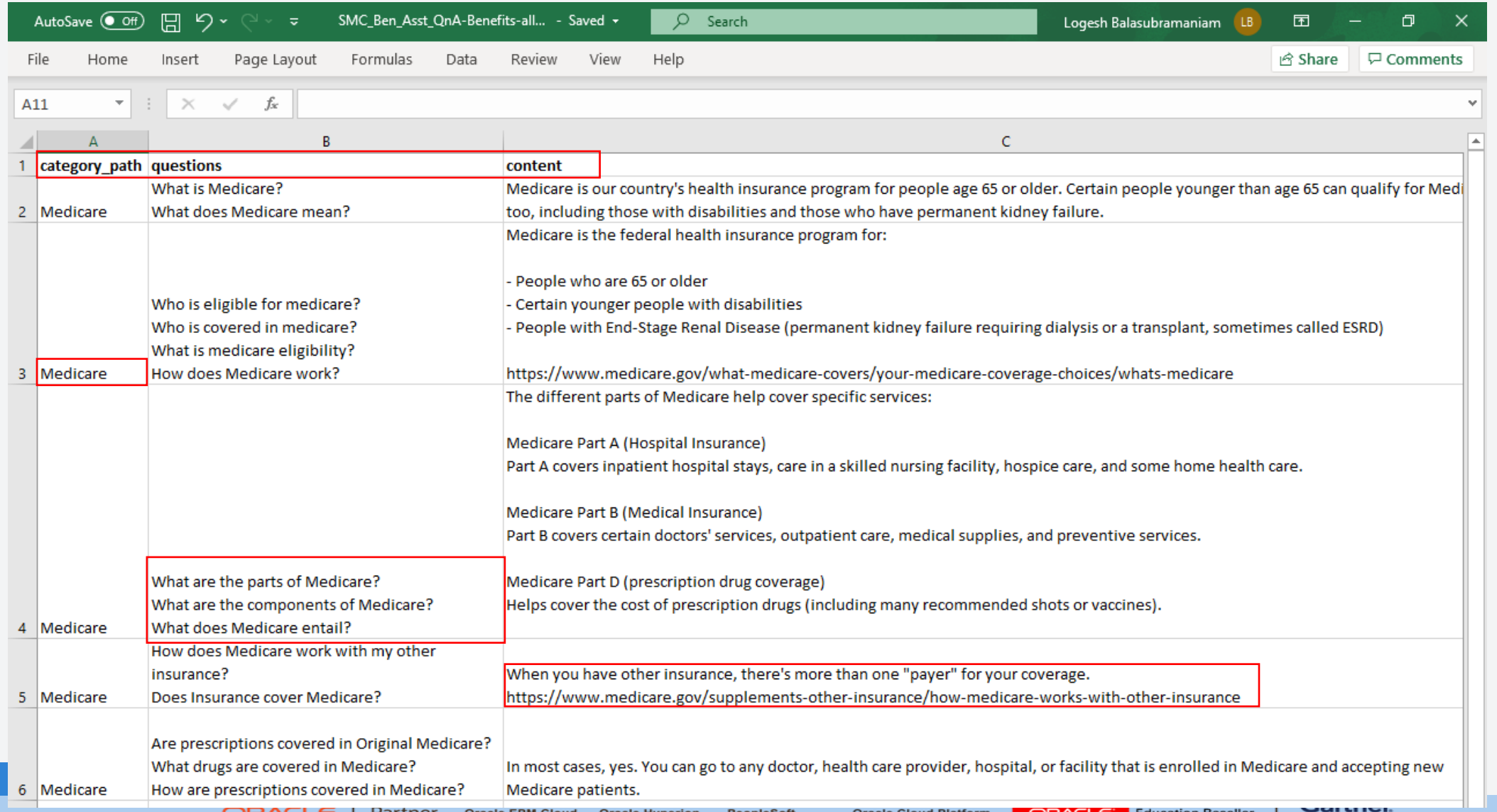
Question and Answers

The Q&A framework enables your skill to answer general interest questions by returning one or more question and answer pairs. It's a way for you to use a skill to surface FAQs or other knowledge-base documents.

- Question and Answer created by importing data source file
- Supports multiple languages
- Ability to manually add/edit question and answers after file upload
- Used for answering Frequently Asked Questions

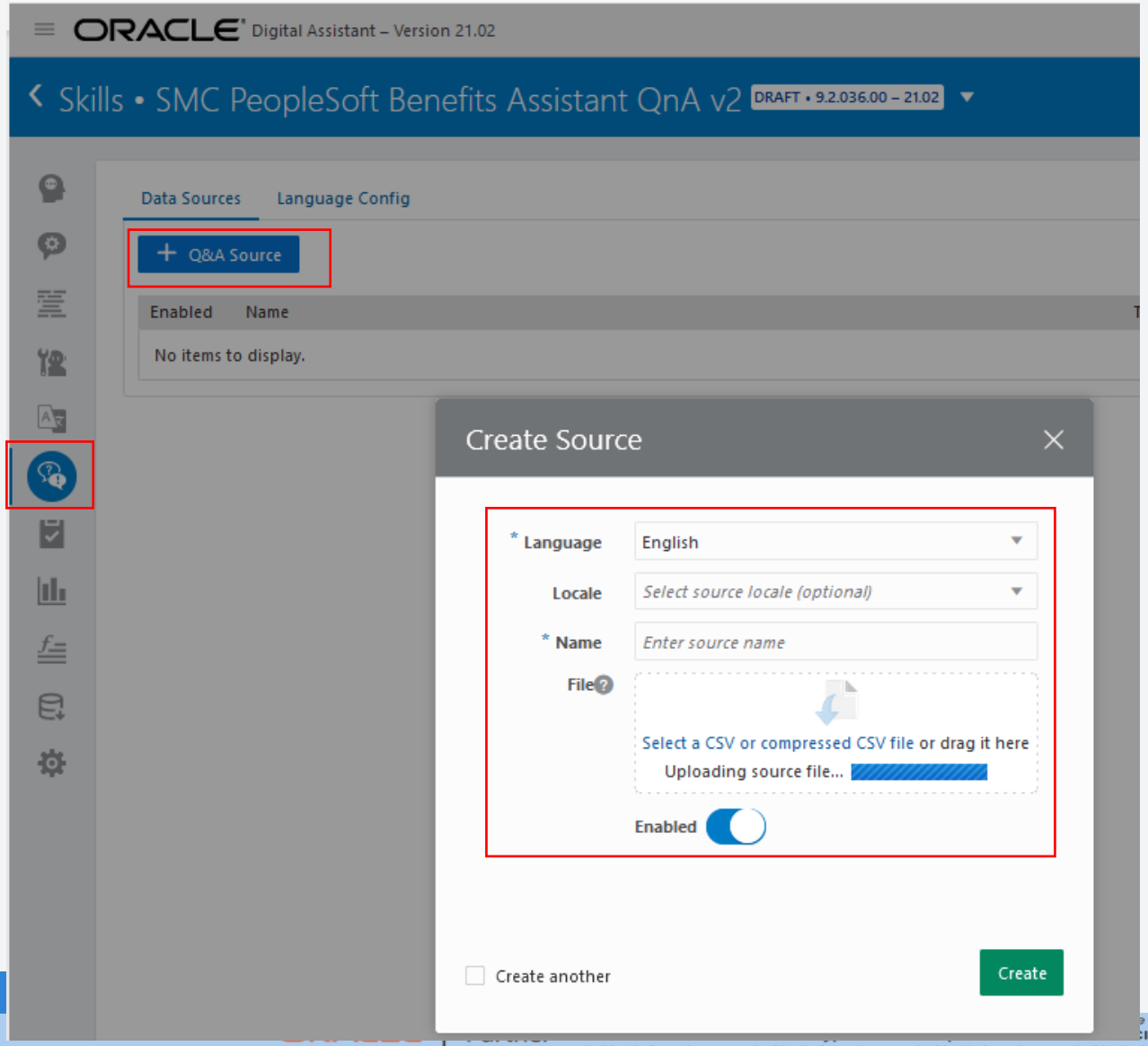
Note: PeopleSoft Chatbots do not have a Question-and-Answer library, customers can create their own.

Question and Answer – Input File

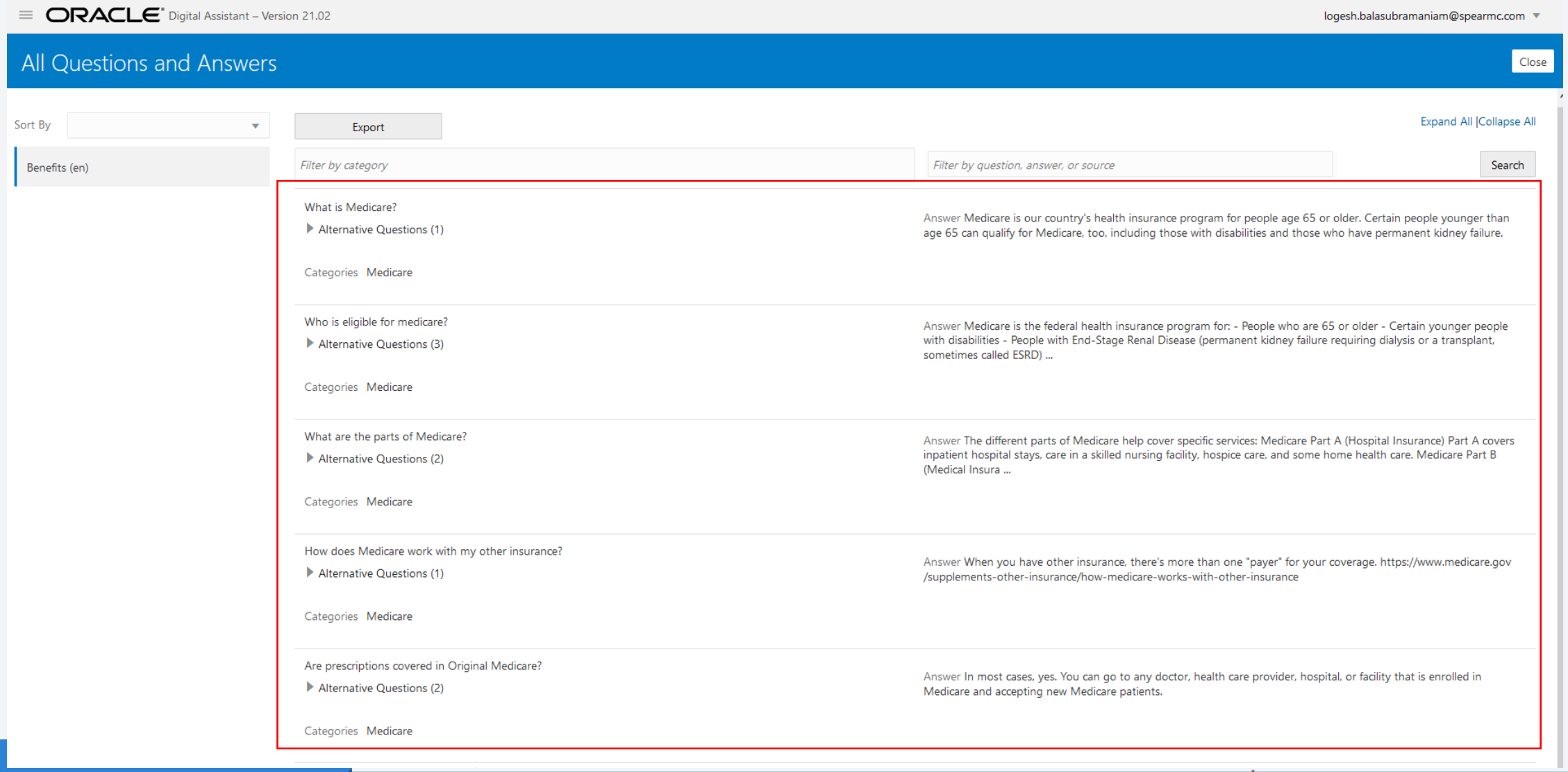


	A	B	C
1	**category_path**	**questions**	**content**
2	Medicare	What is Medicare? What does Medicare mean?	Medicare is our country's health insurance program for people age 65 or older. Certain people younger than age 65 can qualify for Medi too, including those with disabilities and those who have permanent kidney failure.
3	Medicare	Who is eligible for medicare? Who is covered in medicare? What is medicare eligibility? How does Medicare work?	Medicare is the federal health insurance program for: - People who are 65 or older - Certain younger people with disabilities - People with End-Stage Renal Disease (permanent kidney failure requiring dialysis or a transplant, sometimes called ESRD) https://www.medicare.gov/what-medicare-covers/your-medicare-coverage-choices/whats-medicare
4	Medicare	What are the parts of Medicare? What are the components of Medicare? What does Medicare entail?	The different parts of Medicare help cover specific services: Medicare Part A (Hospital Insurance) Part A covers inpatient hospital stays, care in a skilled nursing facility, hospice care, and some home health care. Medicare Part B (Medical Insurance) Part B covers certain doctors' services, outpatient care, medical supplies, and preventive services. Medicare Part D (prescription drug coverage) Helps cover the cost of prescription drugs (including many recommended shots or vaccines).
5	Medicare	How does Medicare work with my other insurance? Does Insurance cover Medicare?	When you have other insurance, there's more than one "payer" for your coverage. https://www.medicare.gov/supplements-other-insurance/how-medicare-works-with-other-insurance
6	Medicare	Are prescriptions covered in Original Medicare? What drugs are covered in Medicare? How are prescriptions covered in Medicare?	In most cases, yes. You can go to any doctor, health care provider, hospital, or facility that is enrolled in Medicare and accepting new Medicare patients.

Creating Q&A Source



Question and Answer Library



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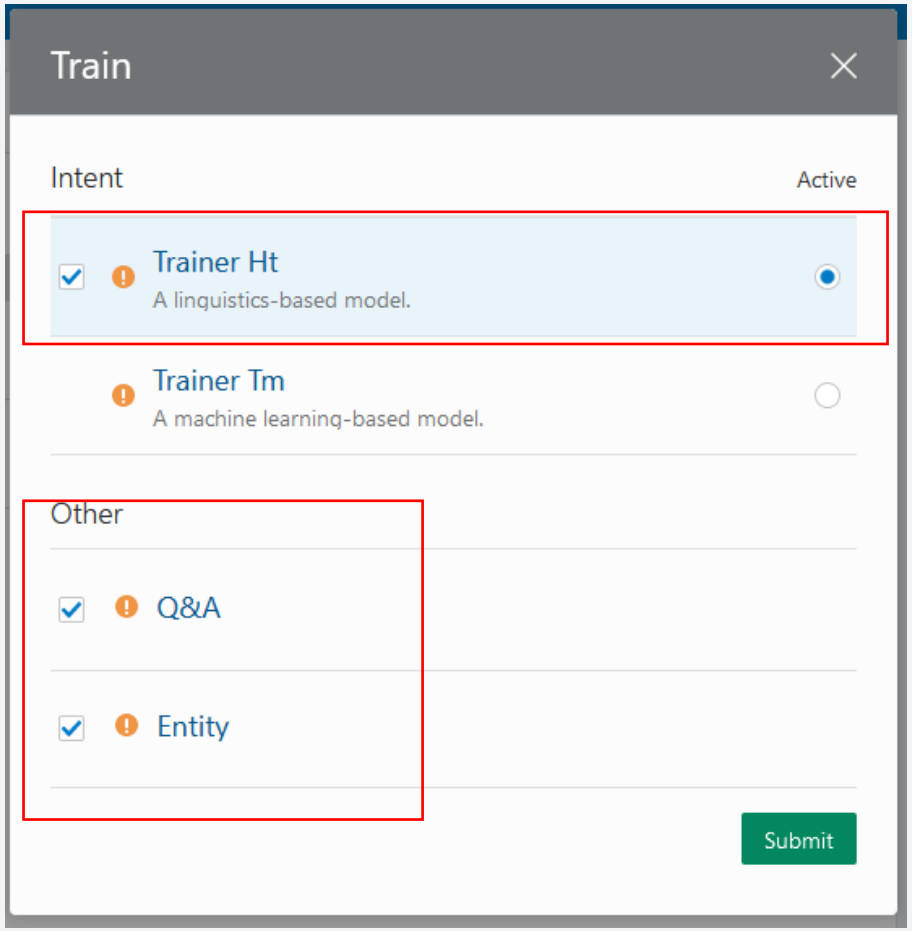
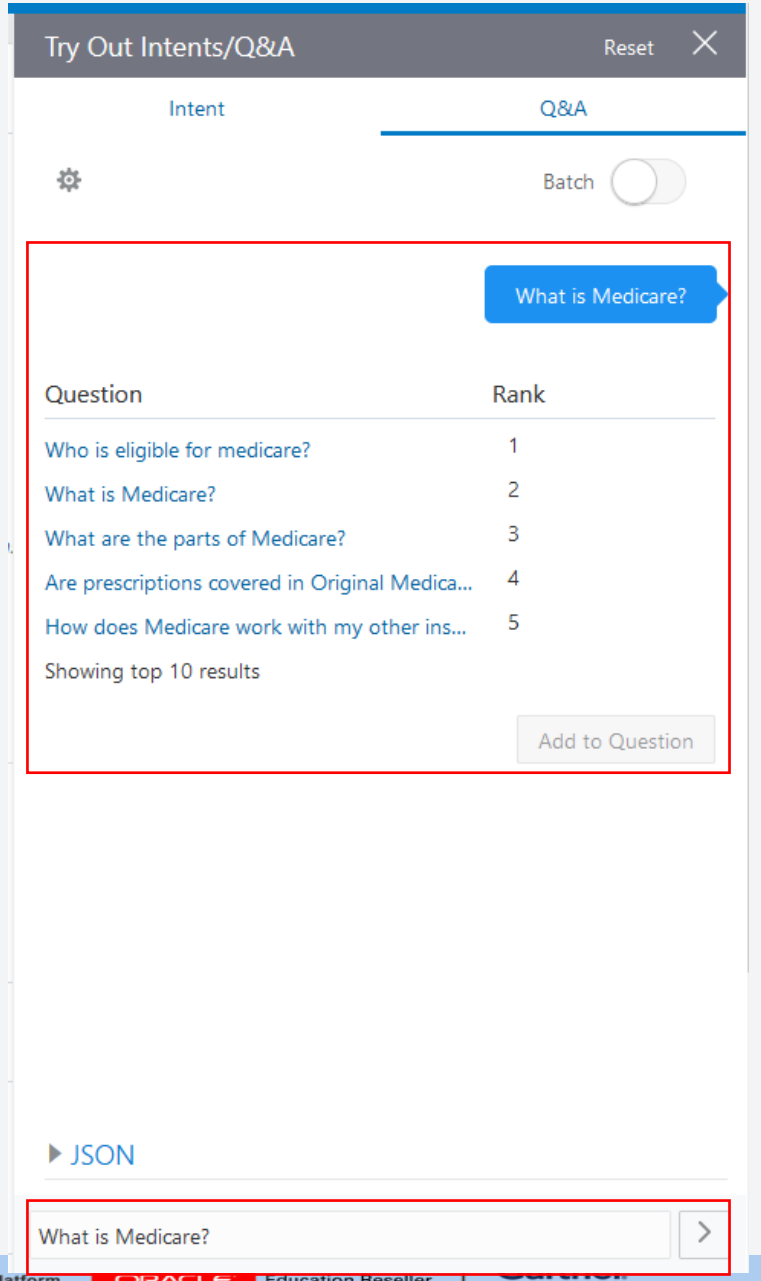
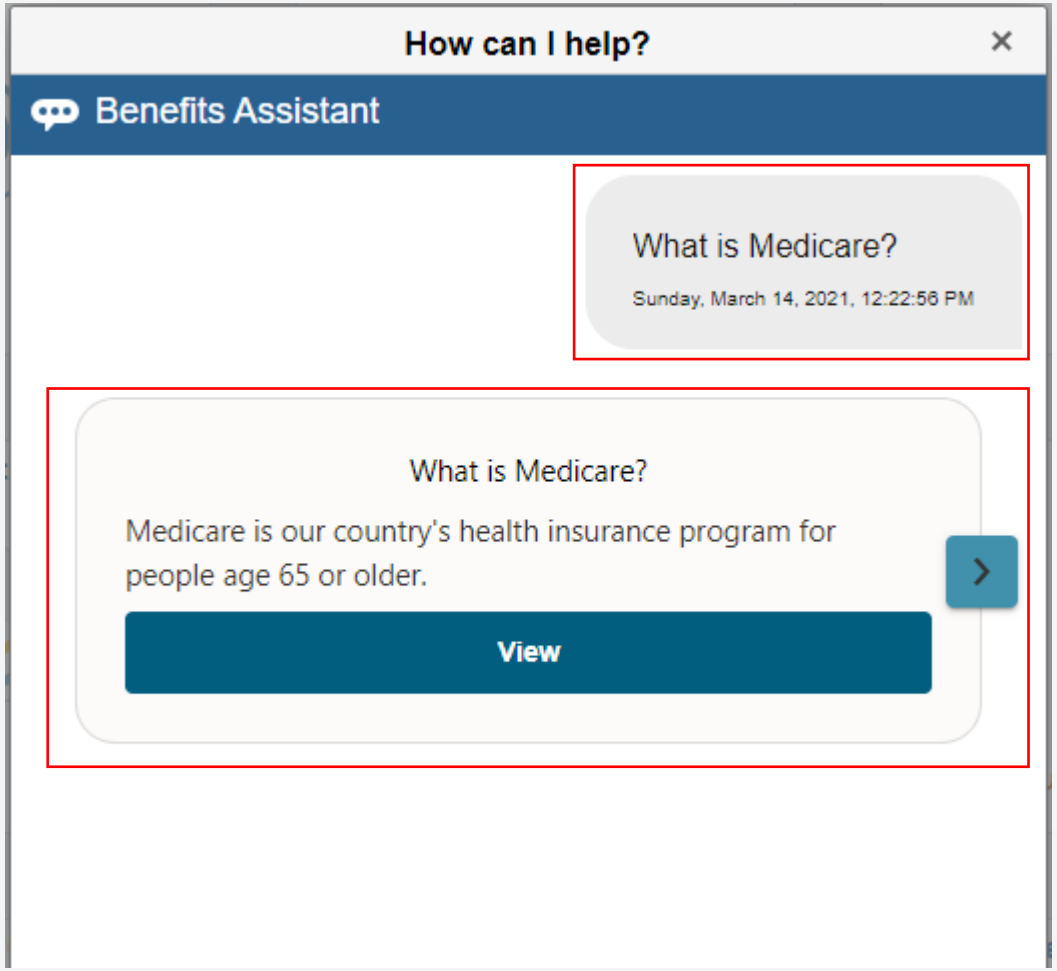
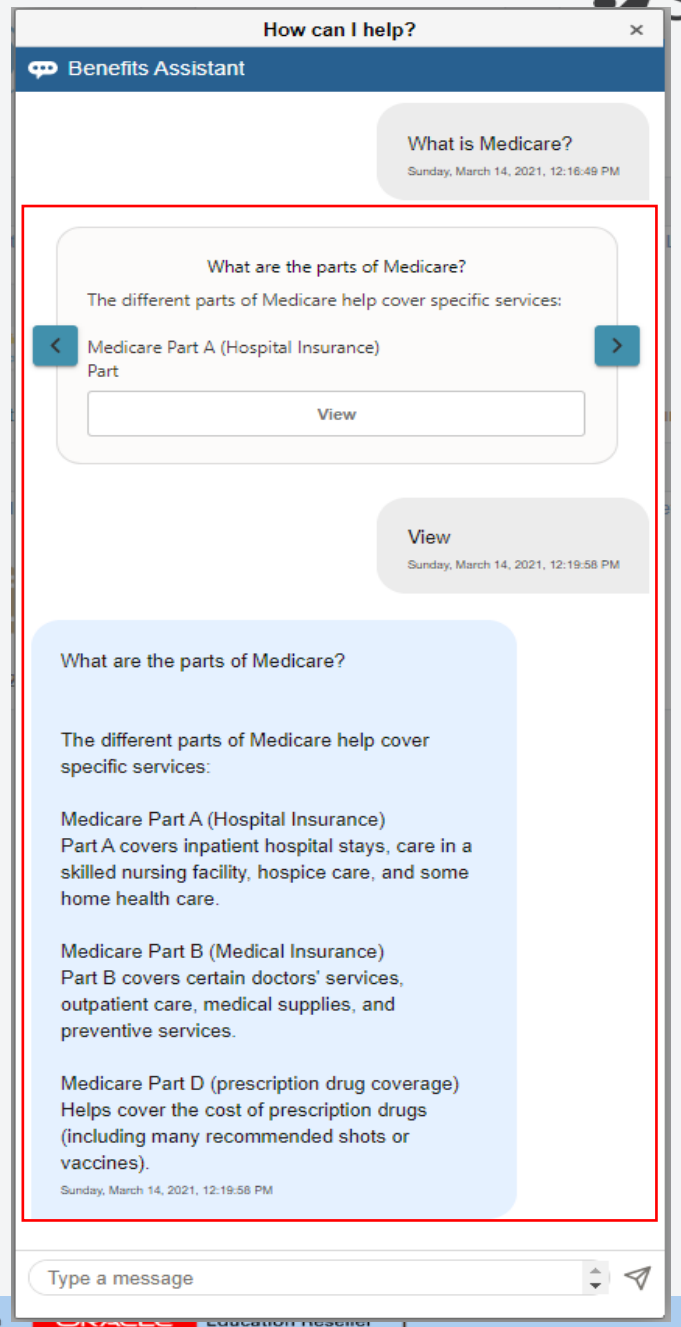
Train Q&A Module





Q&A Example


How can I help?
Benefits Assistant
What is Medicare?
Sunday, March 14, 2021, 12:22:56 PM
What is Medicare?
Medicare is our country's health insurance program for people age 65 or older.
View


How can I help?
Benefits Assistant
What is Medicare?
Sunday, March 14, 2021, 12:16:49 PM
What are the parts of Medicare?
The different parts of Medicare help cover specific services:
Medicare Part A (Hospital Insurance)
Part
View
View
Sunday, March 14, 2021, 12:19:58 PM
What are the parts of Medicare?
The different parts of Medicare help cover specific services:
Medicare Part A (Hospital Insurance)
Part A covers inpatient hospital stays, care in a skilled nursing facility, hospice care, and some home health care.
Medicare Part B (Medical Insurance)
Part B covers certain doctors' services, outpatient care, medical supplies, and preventive services.
Medicare Part D (prescription drug coverage)
Helps cover the cost of prescription drugs (including many recommended shots or vaccines).
Sunday, March 14, 2021, 12:19:58 PM
Type a message

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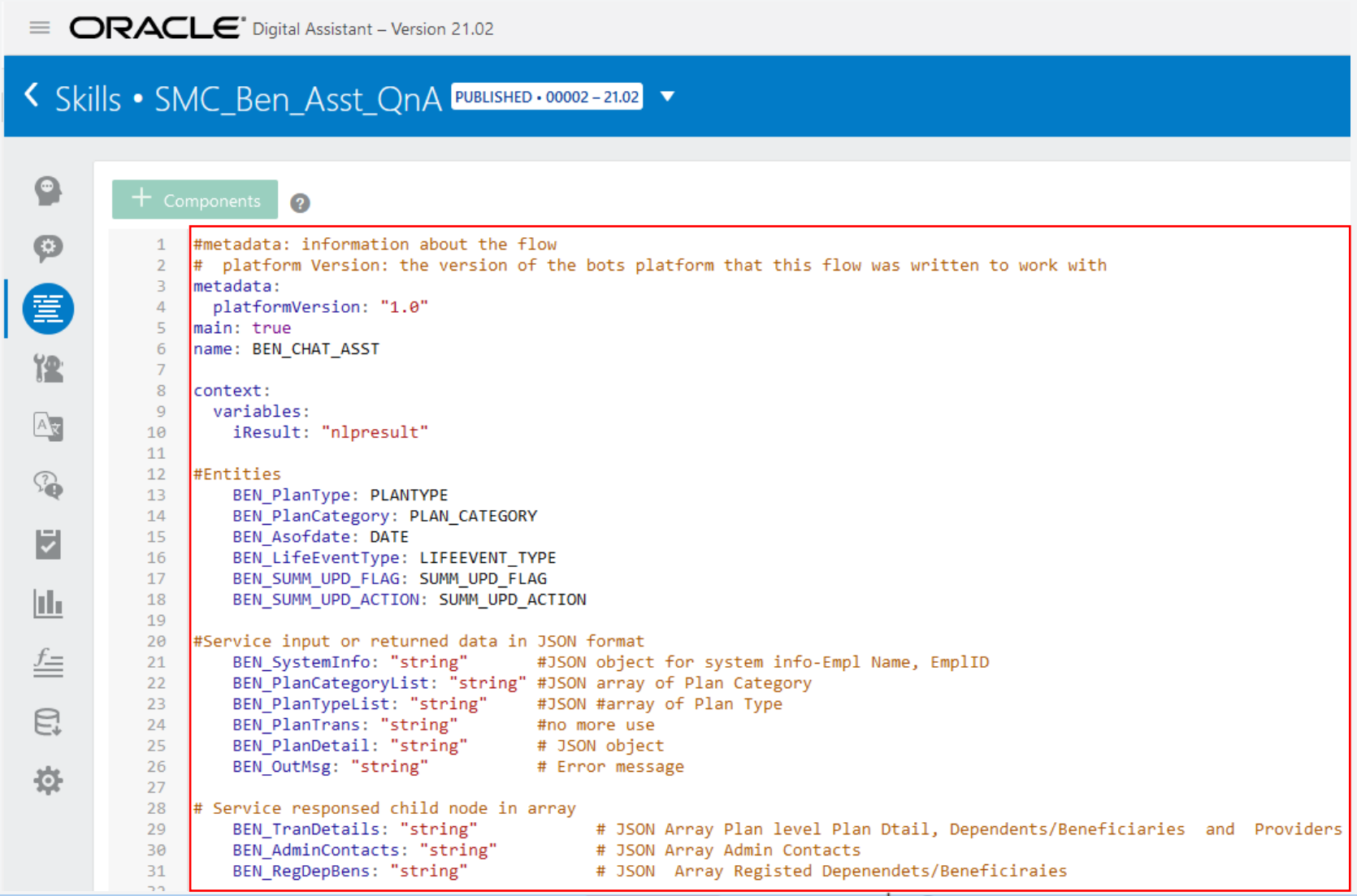
4. Working with Dialog Flow

Dialog Flow - Sample

- The dialog flow definition is the model for the conversation, one that lets us choreograph the interaction between a skill and its users.
- OBotML - Digital Assistant's own implementation of YAML.




```yaml
#metadata: information about the flow
#  platform Version: the version of the bots platform that this flow was written to work with
metadata:
  platformVersion: "1.0"
main: true
name: BEN_CHAT_ASST

context:
  variables:
    iResult: "nlpresult"

#Entities
    BEN_PlanType: PLANTYPE
    BEN_PlanCategory: PLAN_CATEGORY
    BEN_Asofdate: DATE
    BEN_LifeEventType: LIFEEVENT_TYPE
    BEN_SUMM_UPD_FLAG: SUMM_UPD_FLAG
    BEN_SUMM_UPD_ACTION: SUMM_UPD_ACTION

#Service input or returned data in JSON format
    BEN_SystemInfo: "string"       #JSON object for system info-Empl Name, EmplID
    BEN_PlanCategoryList: "string" #JSON array of Plan Category
    BEN_PlanTypeList: "string"     #JSON #array of Plan Type
    BEN_PlanTrans: "string"        #no more use
    BEN_PlanDetail: "string"       # JSON object
    BEN_OutMsg: "string"           # Error message

# Service responsed child node in array
    BEN_TranDetails: "string"            # JSON Array Plan level Plan Dtail, Dependents/Beneficiaries  and  Providers
    BEN_AdminContacts: "string"          # JSON Array Admin Contacts
    BEN_RegDepBens: "string"             # JSON  Array Registed Depenendets/Beneficiraies
```

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Chatbot Dialog Flow

- Customizing Messages and Wordings
- Refining Conversation Flow
- Adding QnA Capability
- Adding new intents and transitions

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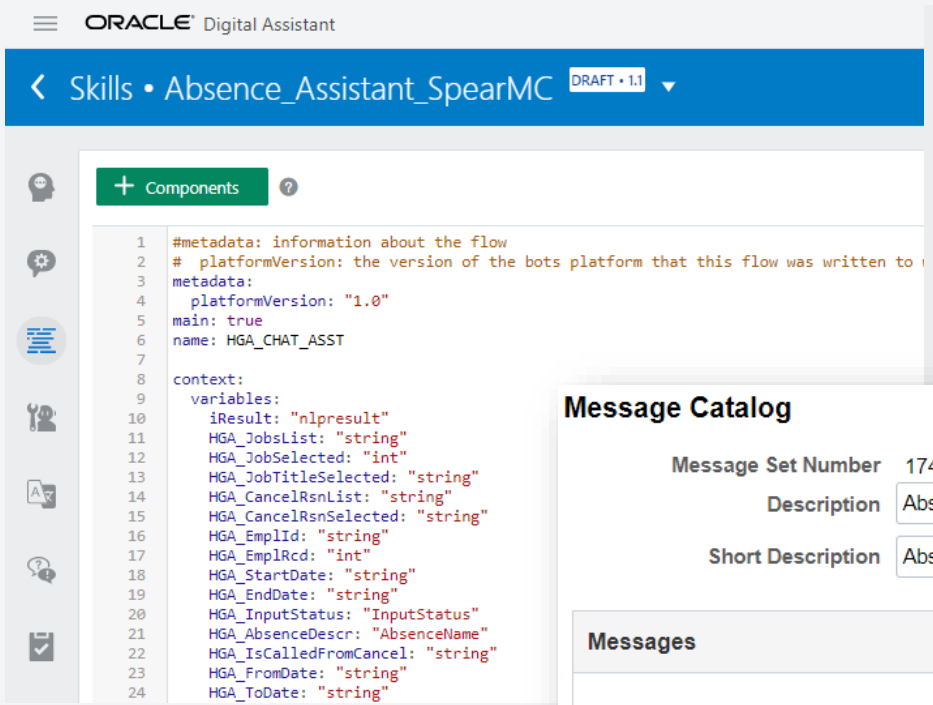
Custom Messages in Dialog Flow




```
1853    properties:
1854      text: "${HGA_MsgCatalogText.value['17448']['151']}"
1855    transitions:
1856      return: "done"
1857
1858  EntryGreeting:
1859    component: "System.Output"
1860    properties:
1861      text: "${HGA_MsgCatalogDescr.value['17448']['152'].replace('%1', profile.AbsUserName)}"
1862      keepTurn: true
1863    transitions:
1864      next: "SetGreetingFlag"
```

Message Catalog

Message Set Number 17448

Description: Absence Mgmt - Chatbot

Short Description: Abs Bot

Messages 52 of 69 View All

*Message Number: 152

*Severity: Message

*Message Text: Hello I am a virtual assistant to help you with your absence tasks and queri

Description:
Hello %1, I can help you with your absence tasks and queries. Please note that I am a Chatbot. If anything goes wrong here, please contact a real person.
You can call 206-555-1111 or email HR-Support@spearmc.com.

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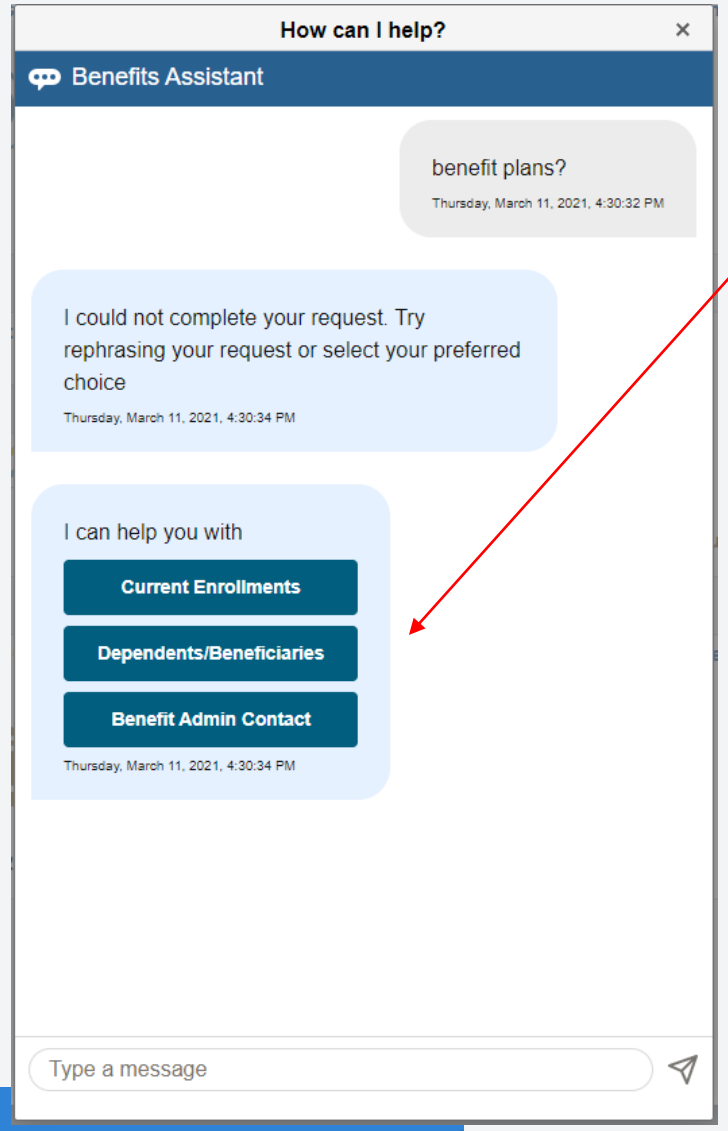
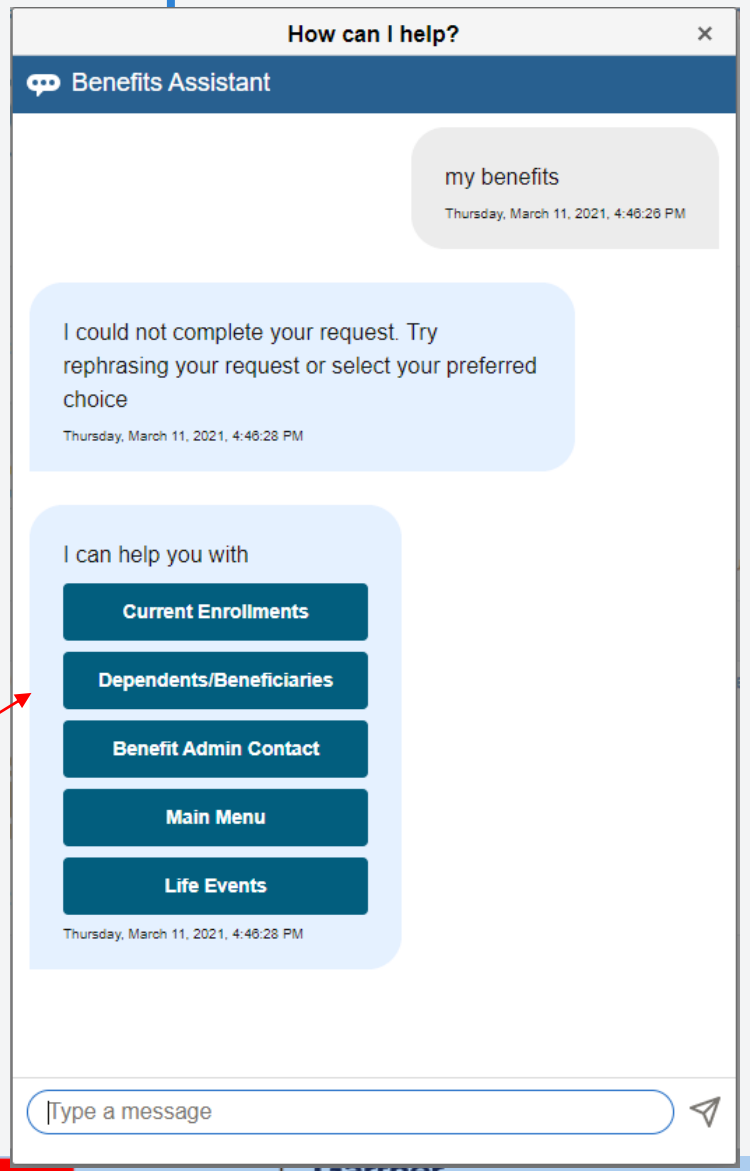
Before and After Dialog Flow Update

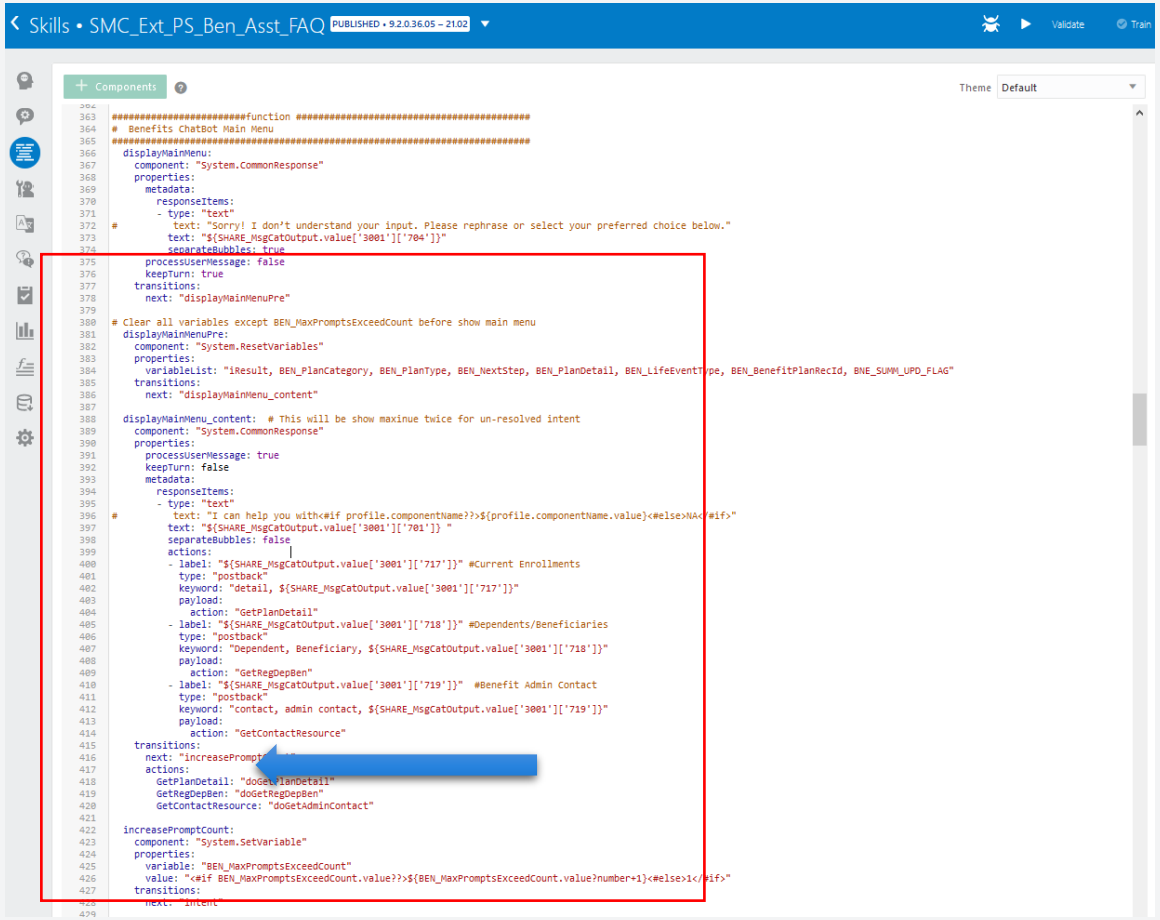


Unresolved intent responded with 3 options.

Unresolved intent updated to respond with 5 options.



Customizing Dialog Flow




```
##########################function ########################################
#  Benefits ChatBot Main Menu
###########################################################################
  displayMainMenu:
    component: "System.CommonResponse"
    properties:
      metadata:
        responseItems:
        - type: "text"
#         text: "Sorry! I don't understand your input. Please rephrase or select your preferred choice below."
          text: "${SHARE_MsgCatOutput.value['3001']['704']}"
          separateBubbles: true
      processUserMessage: false
      keepTurn: true
    transitions:
      next: "displayMainMenuPre"

# Clear all variables except BEN_MaxPromptsExceedCount before show main menu
  displayMainMenuPre:
    component: "System.ResetVariables"
    properties:
      variableList: "iResult, BEN_PlanCategory, BEN_PlanType, BEN_NextStep, BEN_PlanDetail, BEN_LifeEventType, BEN_BenefitPlanRecId, BNE_SUMM_UPD_FLAG"
    transitions:
      next: "displayMainMenu_content"

  displayMainMenu_content:  # This will be show maxinue twice for un-resolved intent
    component: "System.CommonResponse"
    properties:
      processUserMessage: true
      keepTurn: false
      metadata:
        responseItems:
        - type: "text"
#         text: "I can help you with<#if profile.componentName??>${profile.componentName.value}<#else>NAc</#if>"
          text: "${SHARE_MsgCatOutput.value['3001']['701']} "
          separateBubbles: false
          actions:
          - label: "${SHARE_MsgCatOutput.value['3001']['717']}" #Current Enrollments
            type: "postback"
            keyword: "detail, ${SHARE_MsgCatOutput.value['3001']['717']}"
            payload:
              action: "GetPlanDetail"
          - label: "${SHARE_MsgCatOutput.value['3001']['718']}" #Dependents/Beneficiaries
            type: "postback"
            keyword: "Dependent, Beneficiary, ${SHARE_MsgCatOutput.value['3001']['718']}"
            payload:
              action: "GetRegDepBen"
          - label: "${SHARE_MsgCatOutput.value['3001']['719']}"  #Benefit Admin Contact
            type: "postback"
            keyword: "contact, admin contact, ${SHARE_MsgCatOutput.value['3001']['719']}"
            payload:
              action: "GetContactResource"
    transitions:
      next: "increasePrompt
      actions:
        GetPlanDetail: "doGetPlanDetail"
        GetRegDepBen: "doGetRegDepBen"
        GetContactResource: "doGetAdminContact"

  increasePromptCount:
    component: "System.SetVariable"
    properties:
      variable: "BEN_MaxPromptsExceedCount"
      value: "<#if BEN_MaxPromptsExceedCount.value??>${BEN_MaxPromptsExceedCount.value?number+1}<#else>1</#if>"
    transitions:
      next: "intent"
```

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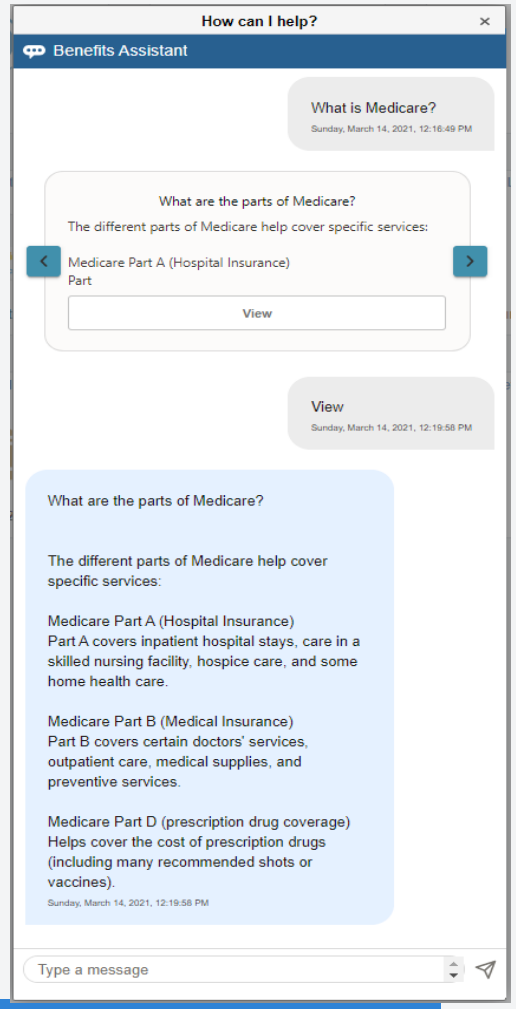
Updates needed to the Dialog flow to add "Q&A" ability to the chatbot.



- Add `qnaEnable: true` to enable the router:

```
intent:
  component: "System.Intent"
  properties:
    variable: "iResult"
    qnaEnable: true
```

Copy

- Set a transition action to the QnA state:

```
    transitions:
      actions:
        Balances: "startBalances"
        Transactions: "startTxns"
        Send Money: "startPayments"
        Track Spending: "startTrackSpending"
        Dispute: "setDate"
        unresolvedIntent: "unresolved"
        qna: "qna"
```

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If the intent resolution is below the confidence threshold, then the skill triggers the `qna` action which the Dialog Engine to the `qna` state. In this case, the skill's message includes the View Answers link only.

```
qna:
    component: "System.QnA"
    transitions:
      actions:
        none: "unresolved"
      next: "intent"
unresolved:
    component: "System.Output"
    properties:
      text: "Sorry I don't understand that question!"
    transitions:
      return: "unresolved"
```

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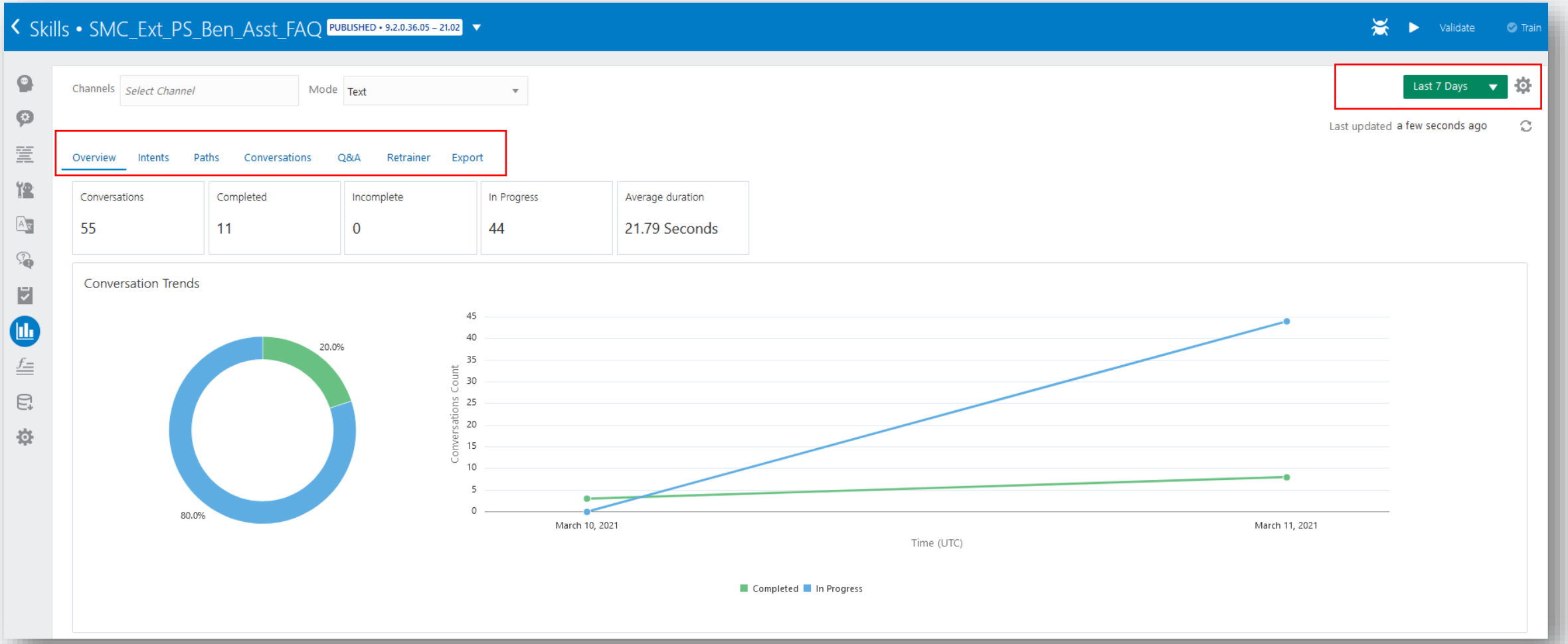
5. Working with Insights

Working with Insights



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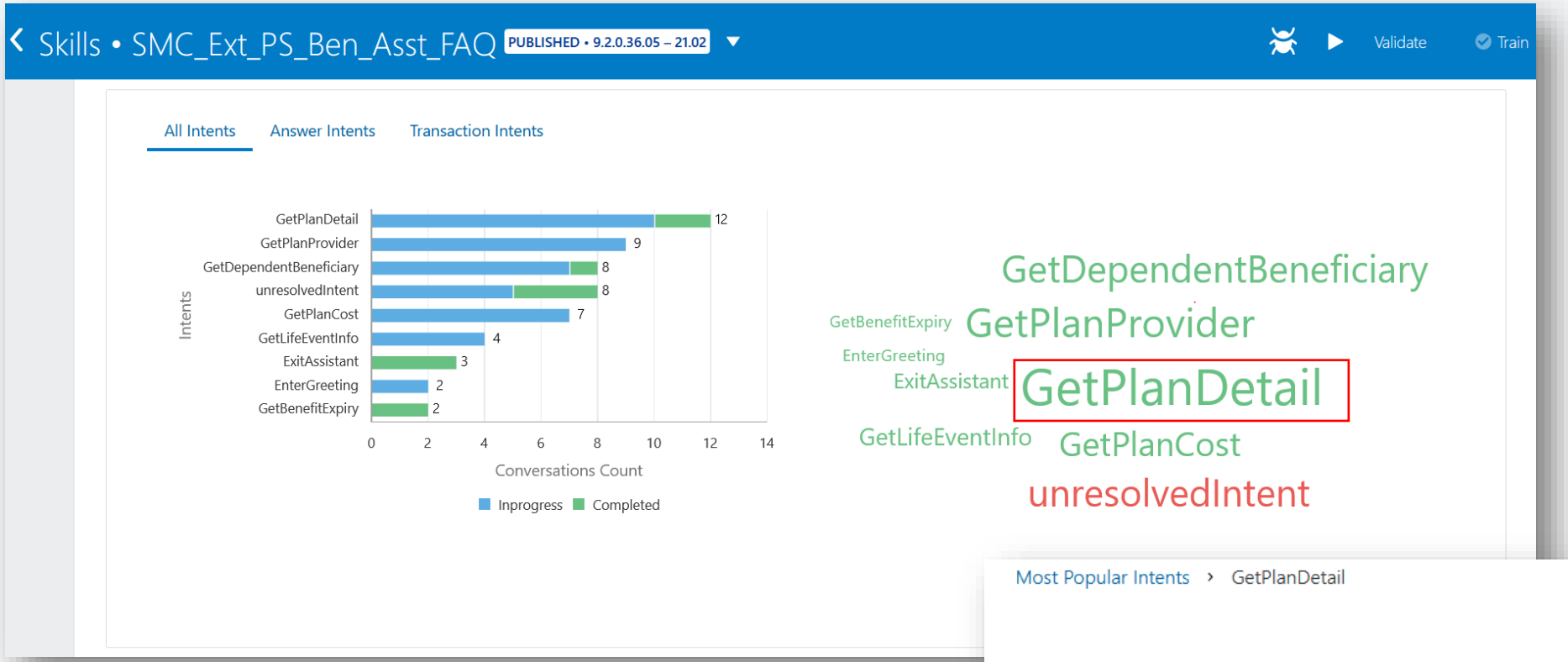

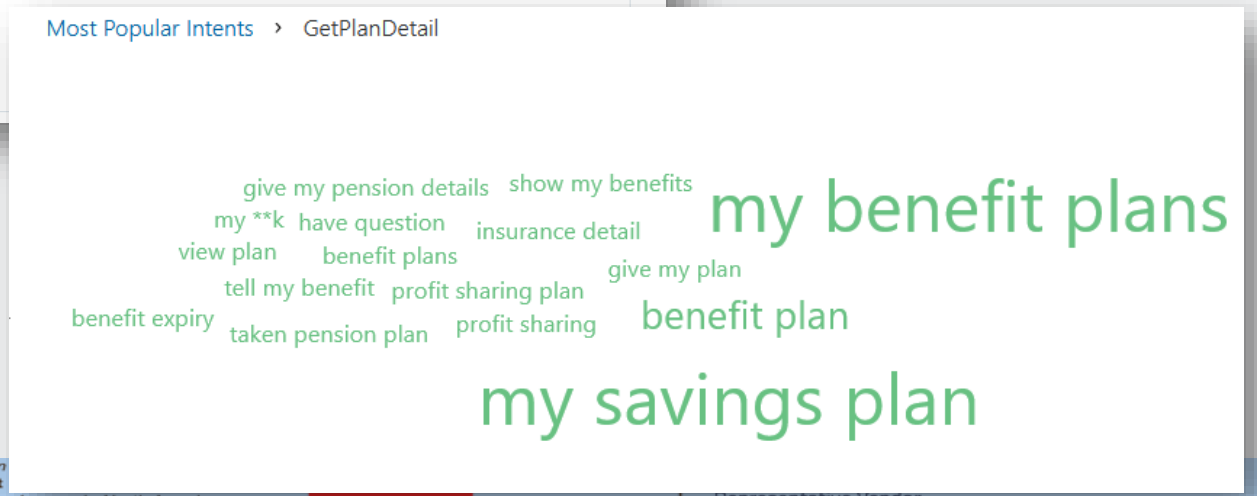

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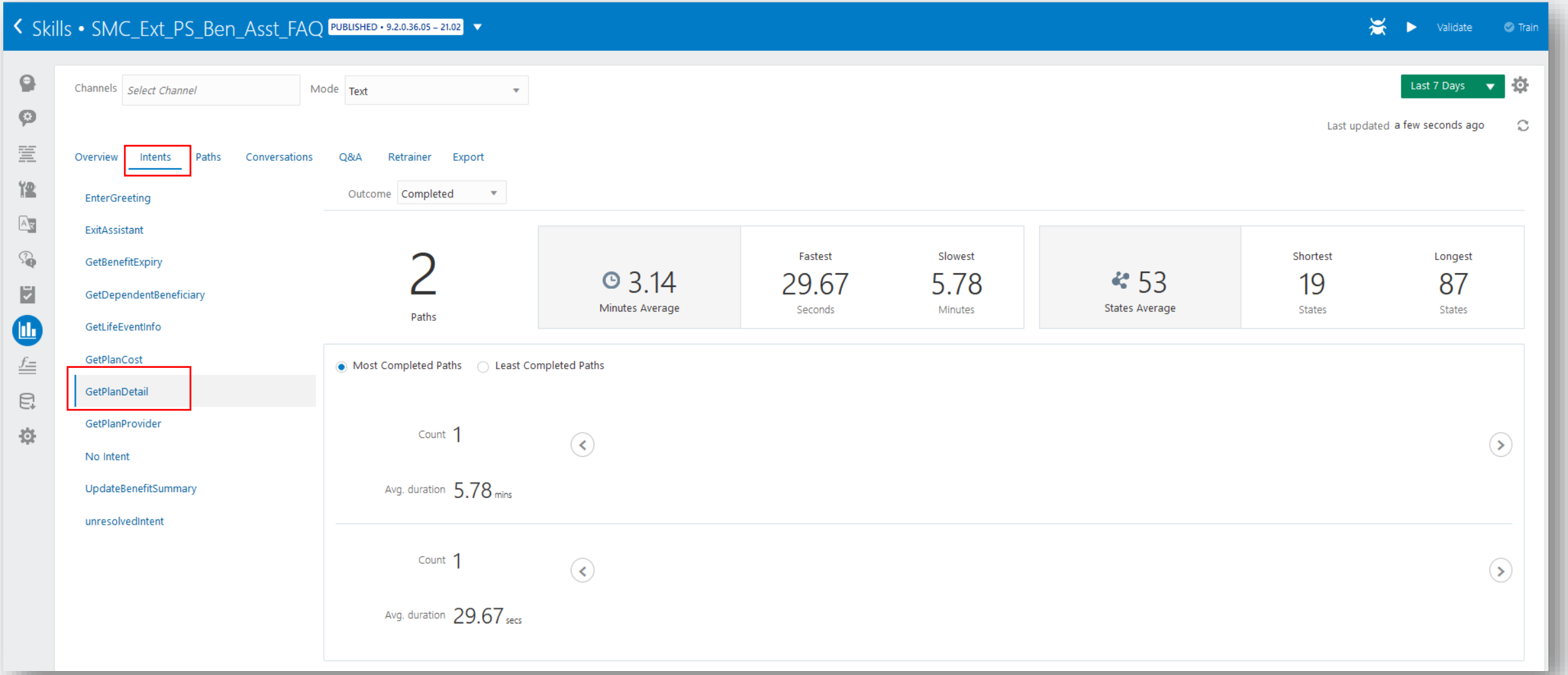
Working with Insights



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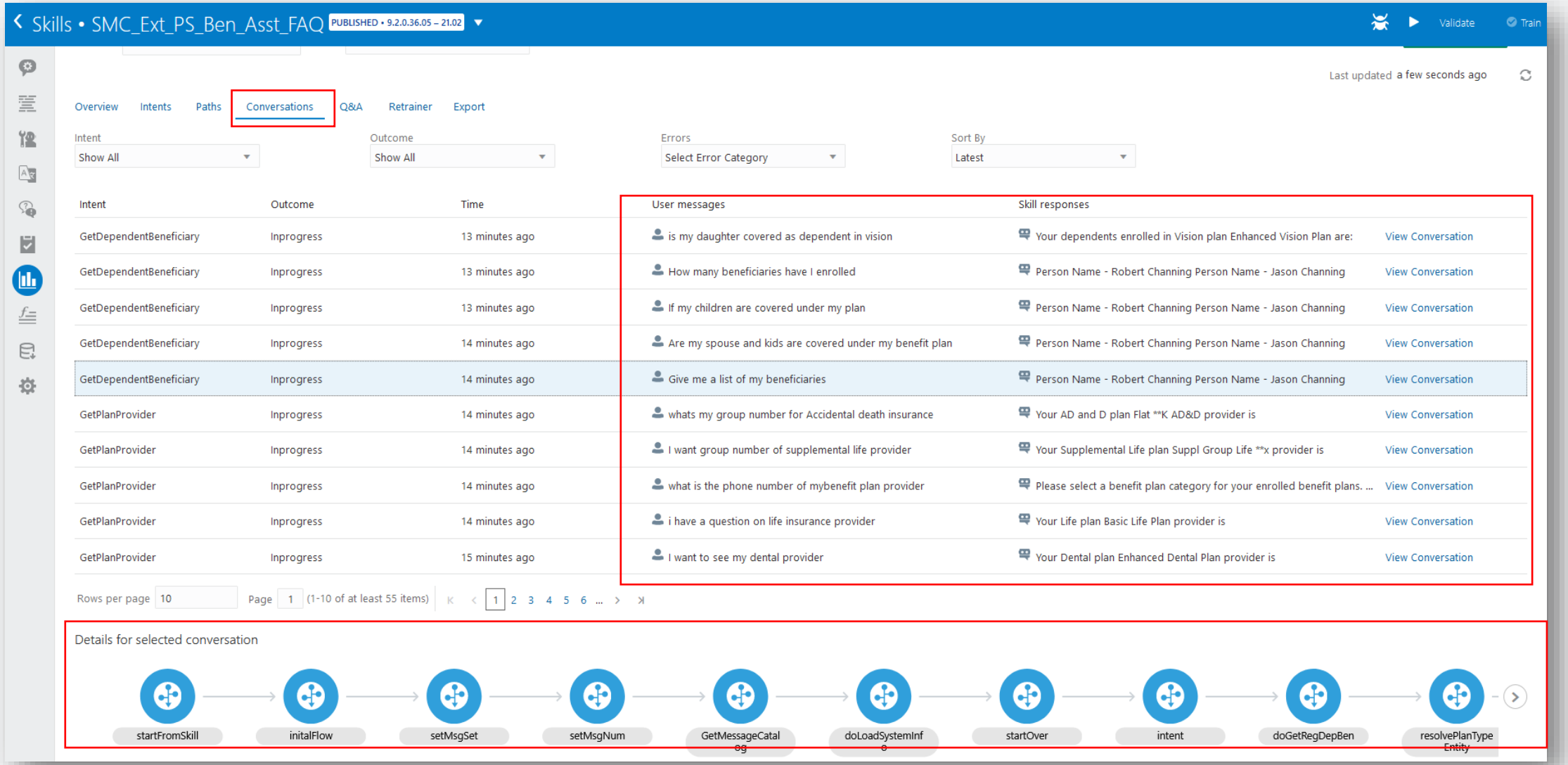

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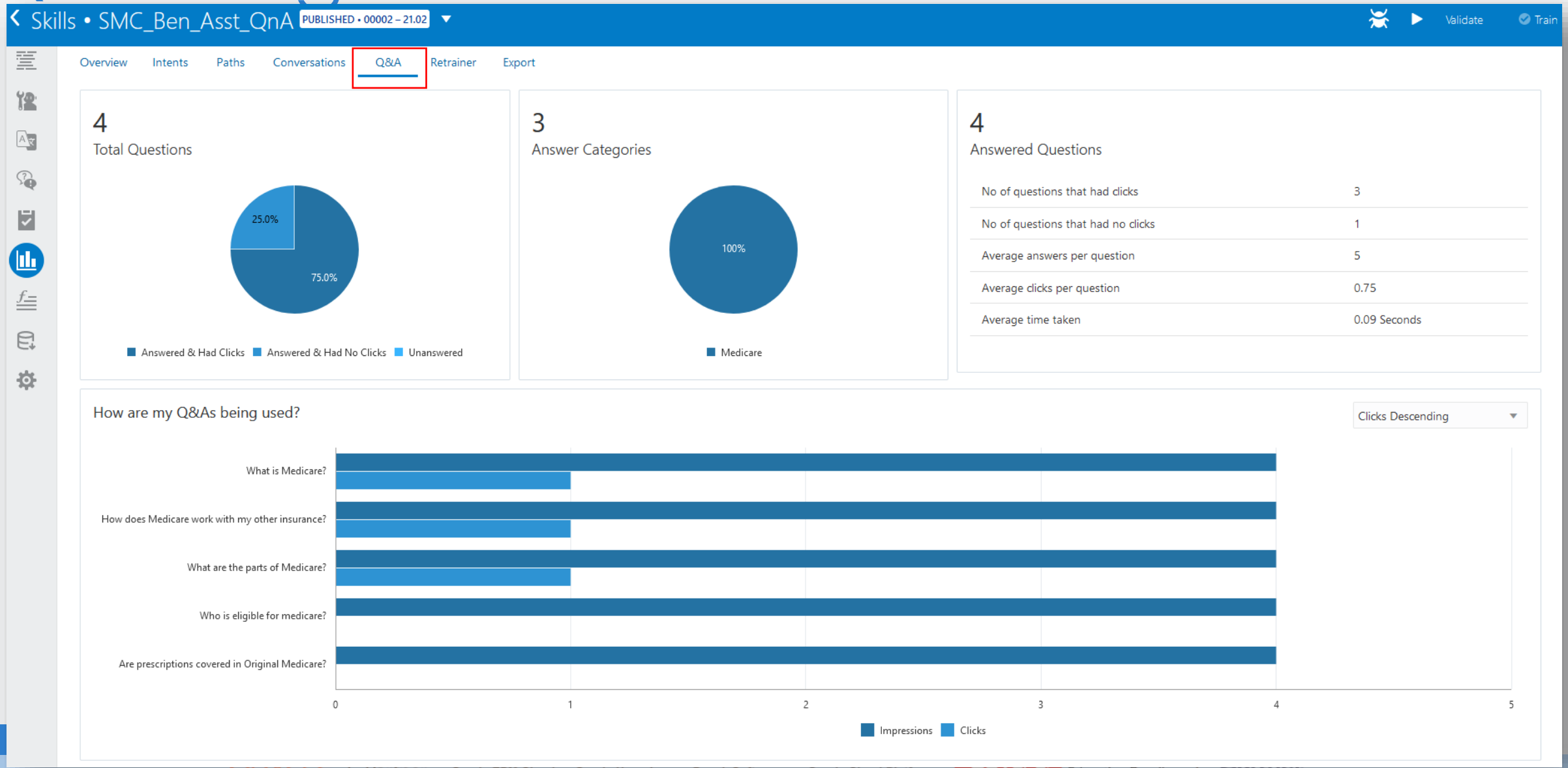
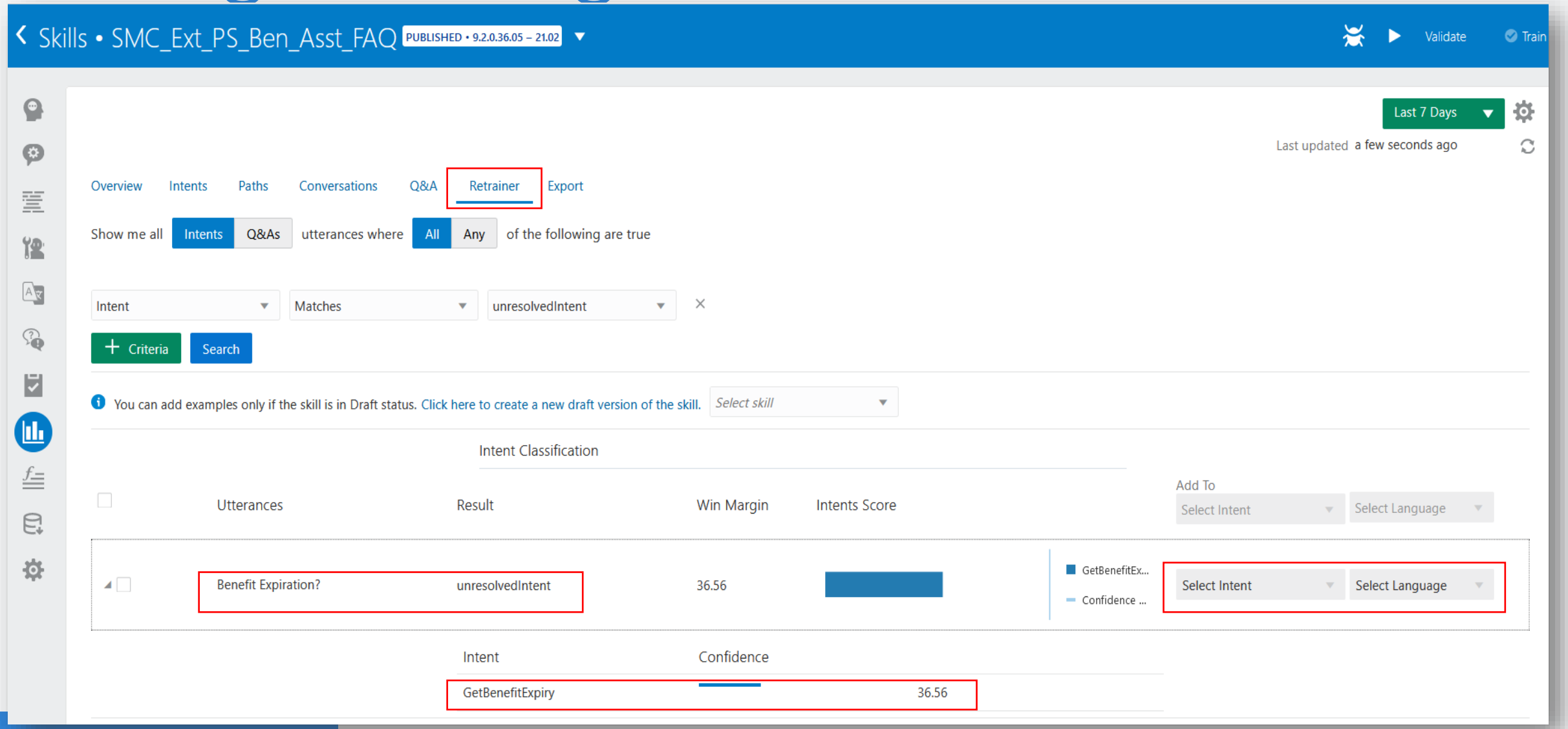
Q&A Insights


Skills • SMC_Ben_Asst_QnA
PUBLISHED • 00002 – 21.02
Validate
Train
Overview
Intents
Paths
Conversations
Q&A
Retrainer
Export
4
Total Questions
25.0%
75.0%
Answered & Had Clicks
Answered & Had No Clicks
Unanswered
3
Answer Categories
100%
Medicare
4
Answered Questions
No of questions that had clicks 3
No of questions that had no clicks 1
Average answers per question 5
Average clicks per question 0.75
Average time taken 0.09 Seconds
How are my Q&As being used?
Clicks Descending
What is Medicare?
How does Medicare work with my other insurance?
What are the parts of Medicare?
Who is eligible for medicare?
Are prescriptions covered in Original Medicare?
0
1
2
3
4
5
Impressions
Clicks

Working with Insights



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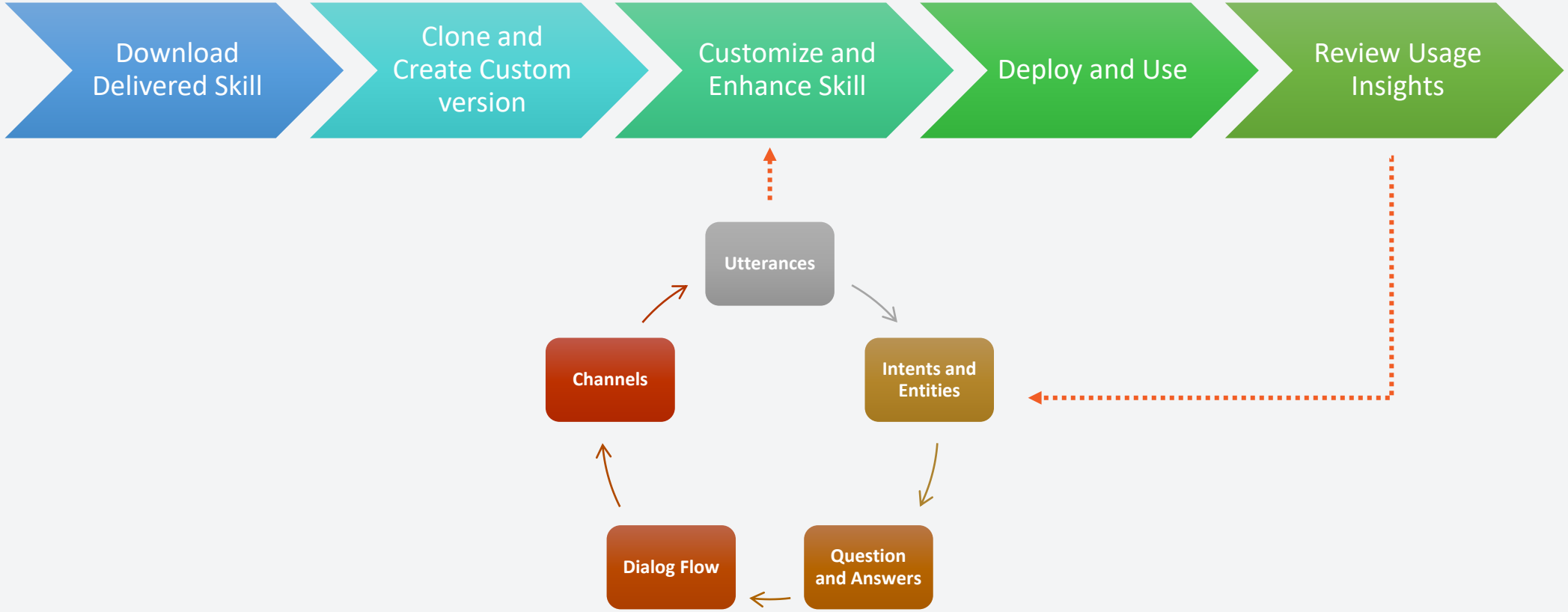
Chatbot Deployment Process



ODA Channels

- Oracle Web *(Default for PeopleSoft)*
- Text-Only Channels: Twilio/SMS *(Supported for PeopleSoft)*
- *Slack*
- *Microsoft Teams*
- *Facebook Messenger*
- *Cortana*
- *Oracle Android*
- *Oracle iOS*
- *Webhooks*

PeopleSoft

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Phone:512 994 5971
Blog: http://leanitdesigns.blog/

Session ID:

100180

Quest
PeopleSoft
Community

SpearMC Sessions

Day 1 – Tuesday (10/5)

- 09:15 AM - The Road to Kibana: Learn how a PeopleSoft customer paved their way to Data Visualizations (100300)
- 12.15 PM - Your complete guide to COVID data tracking and reporting using PeopleSoft HCM (101840)
- 02:15 PM - Modernize your HR Data Maintenance with PeopleSoft Position Management (100550)

Day 2 – Wednesday (10/6)

- 09:45 AM - Children's Hospital WI: Lessons Learned 18 months since going live with PeopleSoft on OCI (100280)
- 11:45 AM - Deep Dive into new Grants functionality, PUM 32-39 – Implementing Continuous Improvements (100200)
- **03:00 PM - Get PeopleSoft Chatbots Production Ready In 5 Simple Steps (100180)**
- 05:00 PM - Learning at the right time in the right place and right way. Make training real time (101130)

Day 3 – Thursday (10/7)

- 09:15 AM - PeopleSoft Expenses at HMH: Featuring Google Maps Int., Fluid, Duo and Twilio Text Receipts (100330)
- 11:00 AM - PeopleSoft ChatBots: Use Case for Financials and Supply Chain (100310)
- 02:45 PM - Case Study at RWJ Barnabas Health: PeopleSoft Automated Testing and PTF Accelerators (100270)

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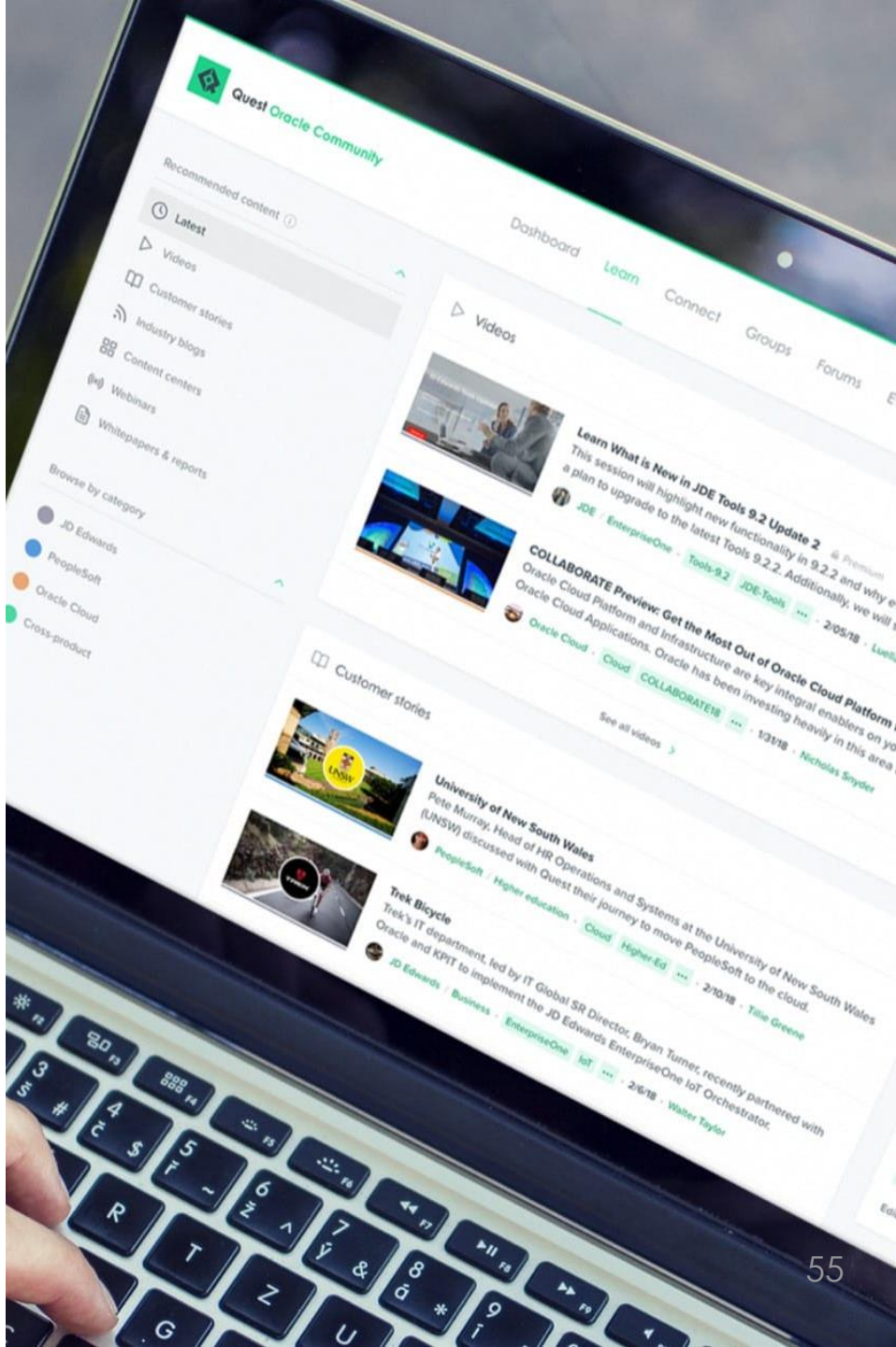

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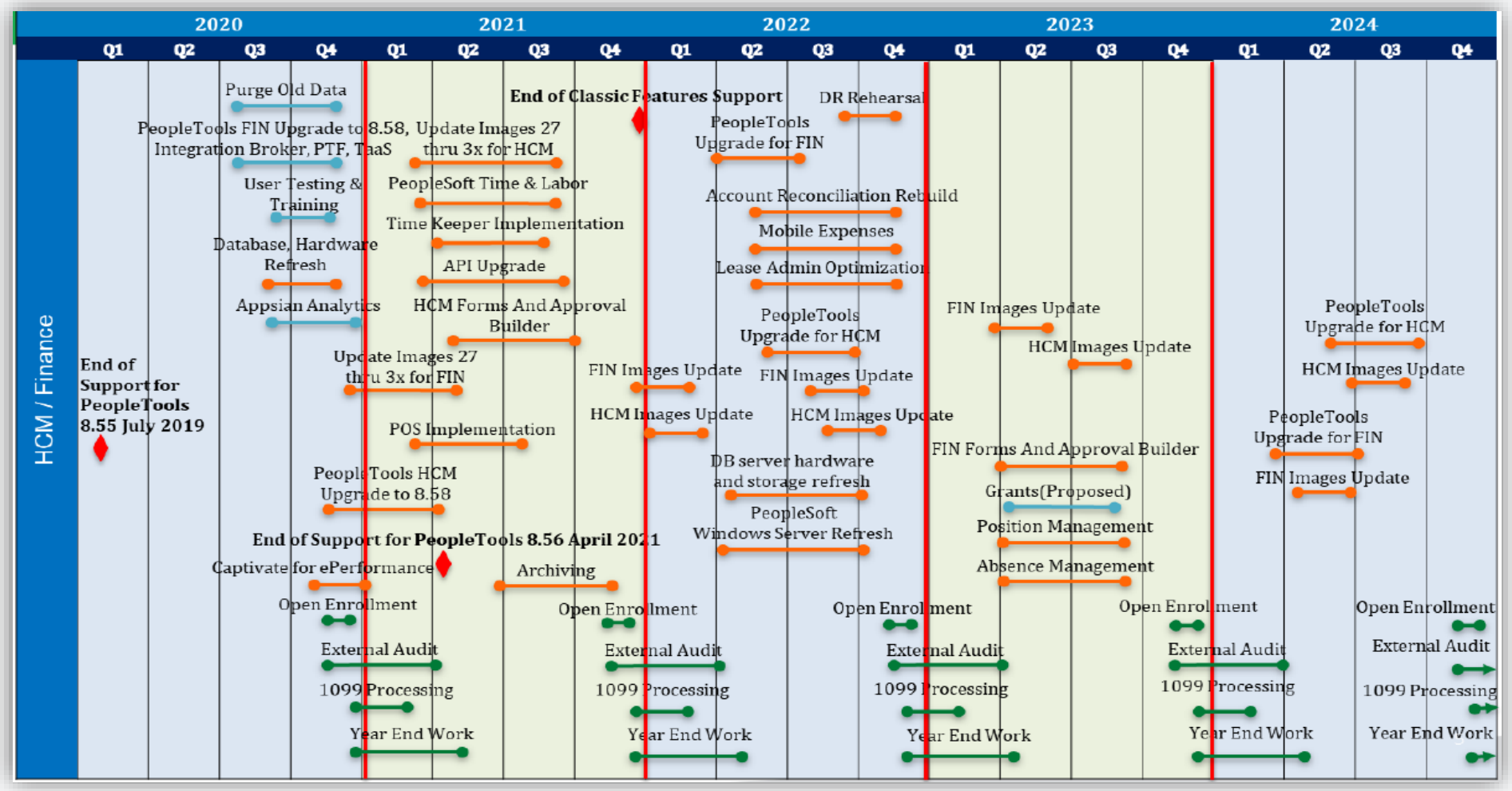
PeopleSoft Roadmap Specialist



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