PeopleSoft ChatBots: Use Case for Financials and Supply Chain

Session 101480

BLUEPRINT 4D

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June 6 - 9, 2022

The global Oracle customer event

Meet SpearMC

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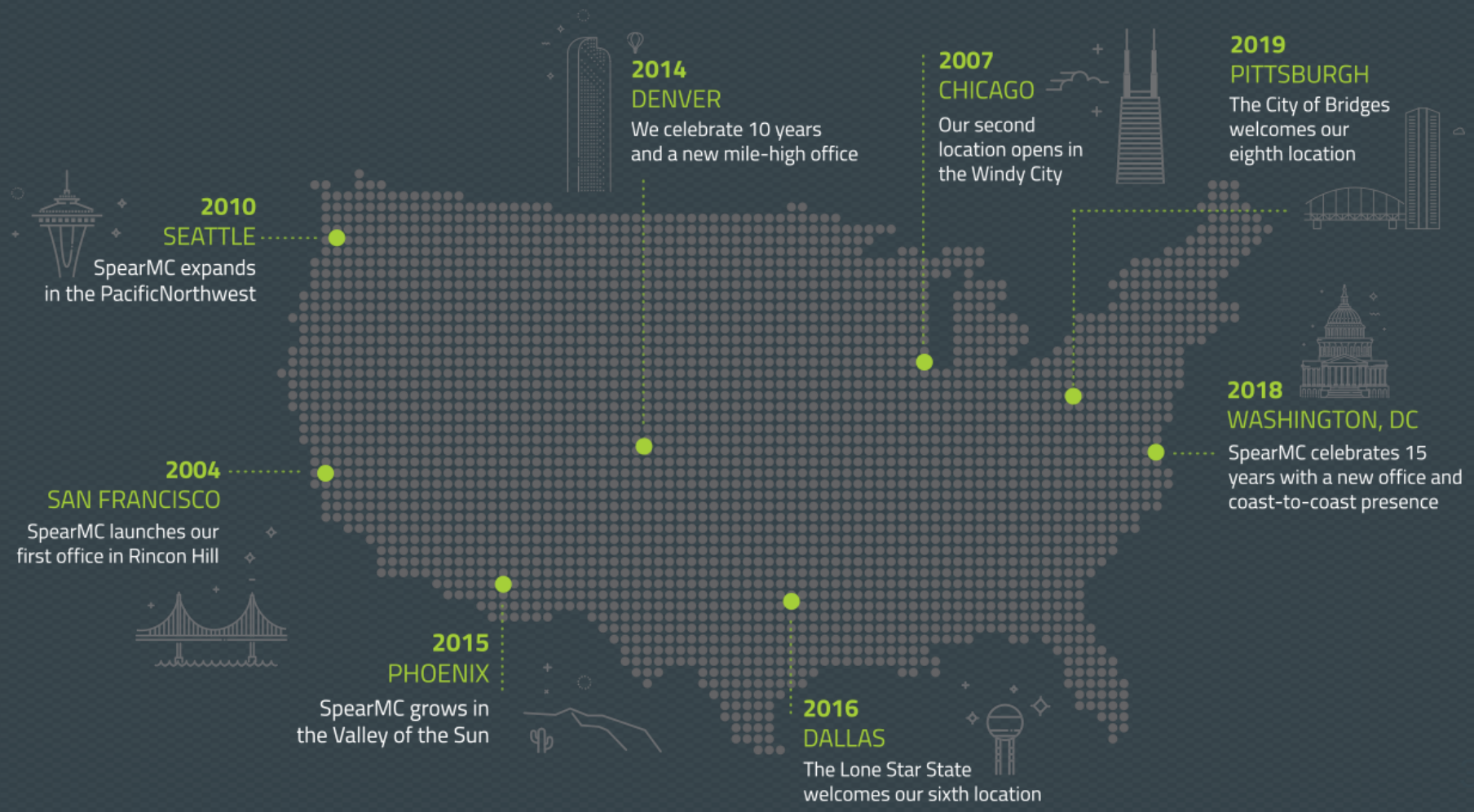
Certifications: PeopleSoft, Oracle Cloud Infrastructure, Hyperion Planning

ORACLE
Certified Specialist

Coast-to-coast Coverage

SpearMC



Our Services

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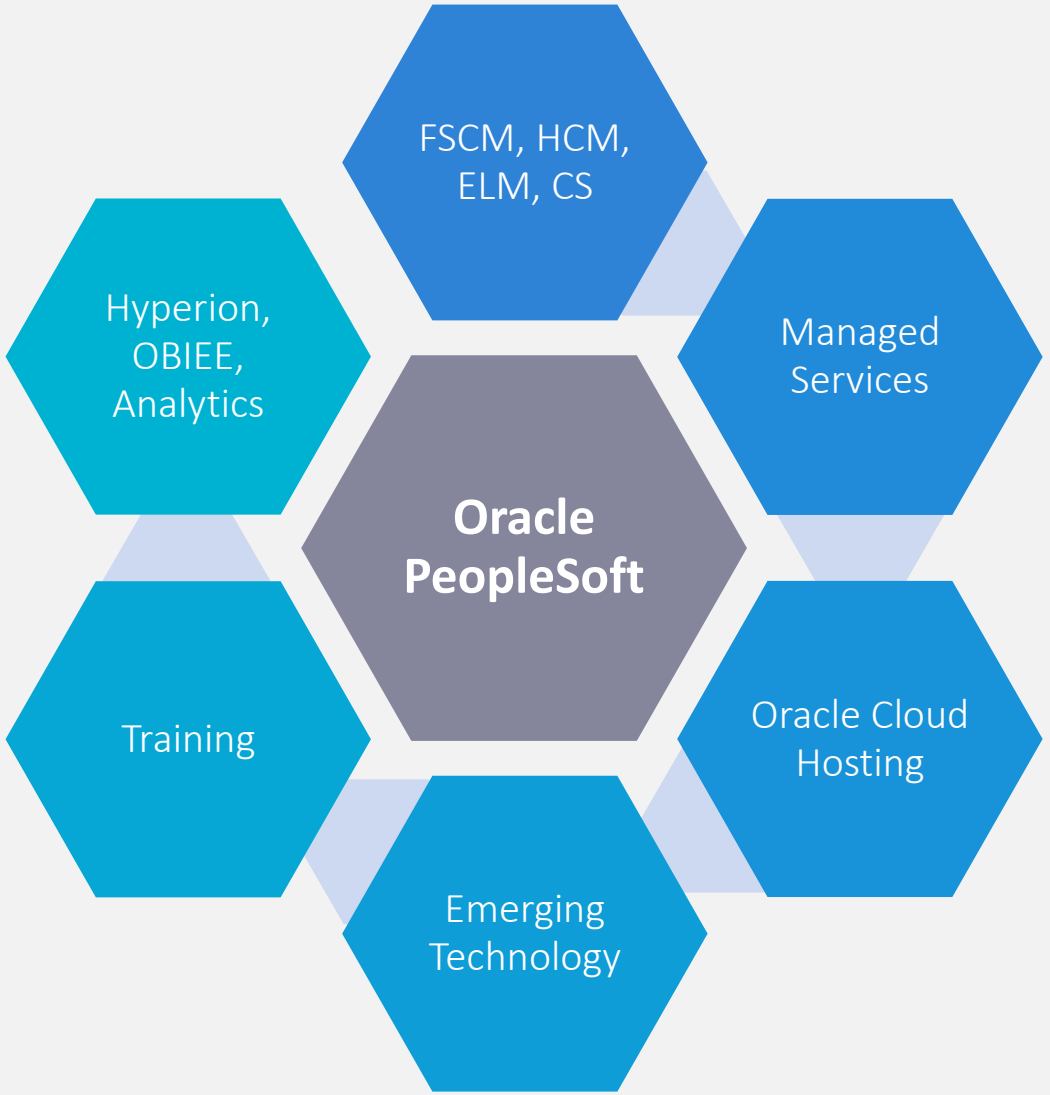


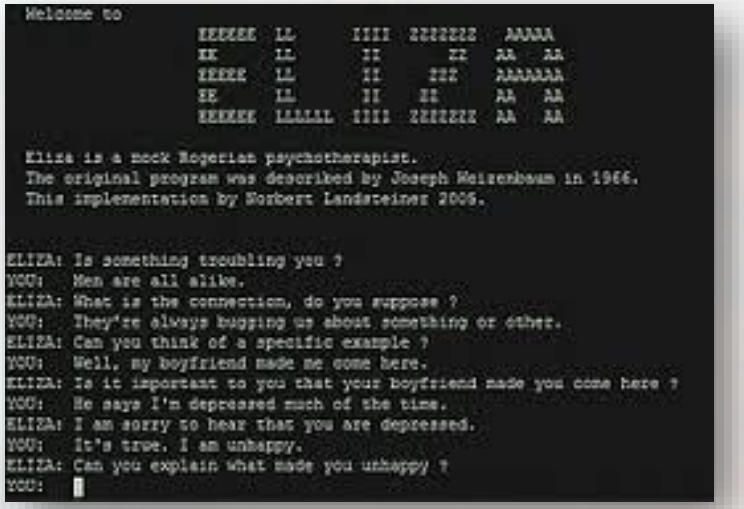
Gartner recognized. Oracle specialized.

SpearMC is the sole featured PeopleSoft vendor in the latest 2021 Gartner Market Guide for Oracle Professional Services. We invested heavily into PeopleSoft several years ago and went “all in” with our leading approach to Oracle Cloud Infrastructure.

READ MORE >

A (brief) History of Conversational Interfaces

How many do you recognize?



Conversational Interface

A *conversational interface* (CUI) is a user interface for computers that emulates a conversation with a real human.

Instead of the user having to learn (by navigating through a menu or entering the right information into the right field and clicking the right buttons), CUI's provide opportunity for user to speak naturally and for the machine to learn.

Conversational Interface – Basic Flow

Interpretation of the *Intent* of the user using Natural Language Processing (NLP)

Matching to a *Dialog Flow*

Retrieve Data/Information

Translate Data back into Conversational Response

Conversational Interface

Changing Demographics & Expectations of the WorkForce…

Currently, Millennials and Gen Z make up 1/3 of the workforce. Within a decade they will make up over 50%.

Not only will employees accept functioning conversational interfaces, they will expect them.

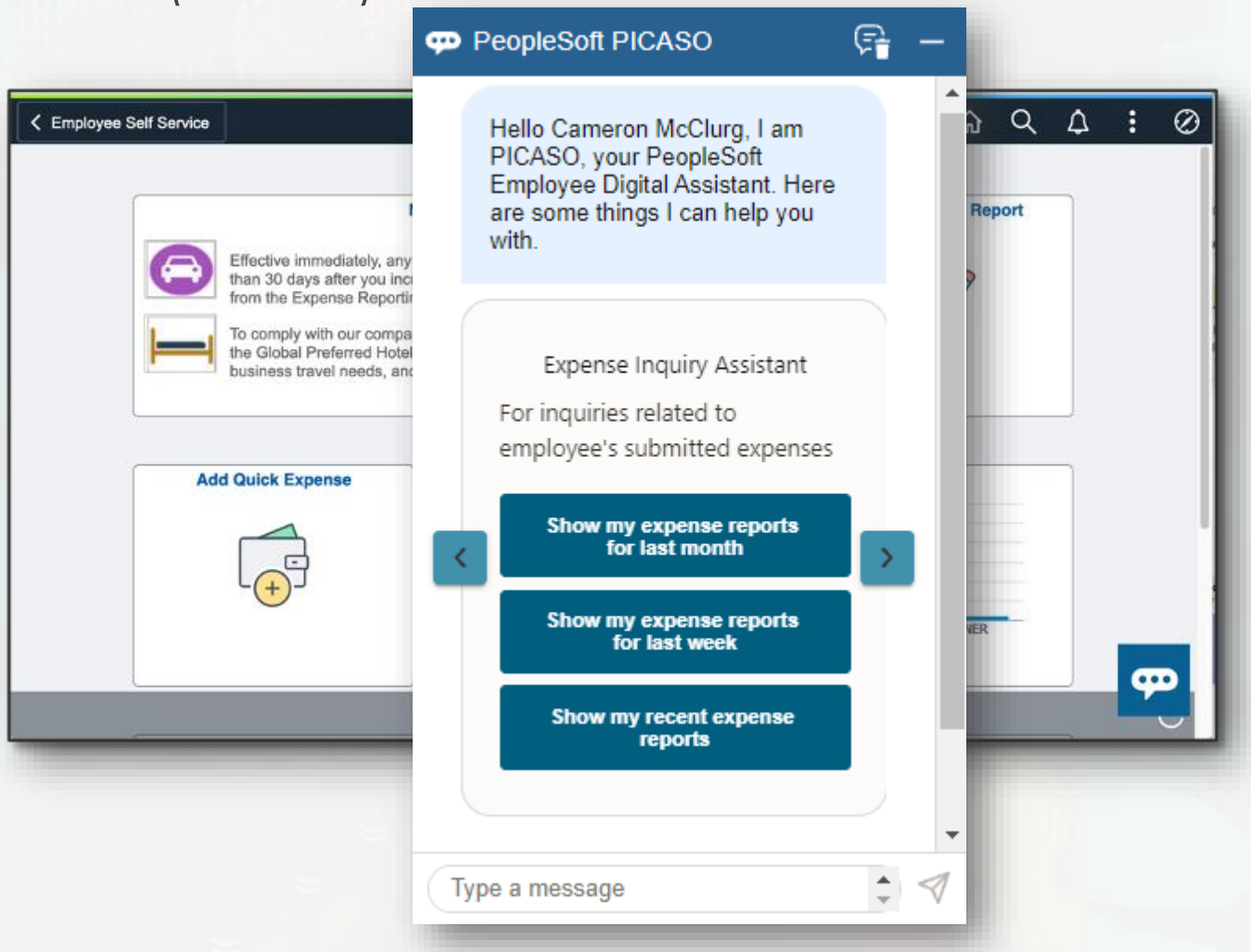
PeopleSoft Chatbot Overview

PeopleSoft Intelligent Chat Assistant from Oracle (PICASO)

Employee Focused
- Benefit
- Payroll for NA
- Absence
- Employee Directory
- Expense Inquiry
- Requisition Inquiry

Supplier "Public" Focused
- Supplier Public skill

Suplier "Secure" Focused
- Collaboration
- General
- Invoice and Payment



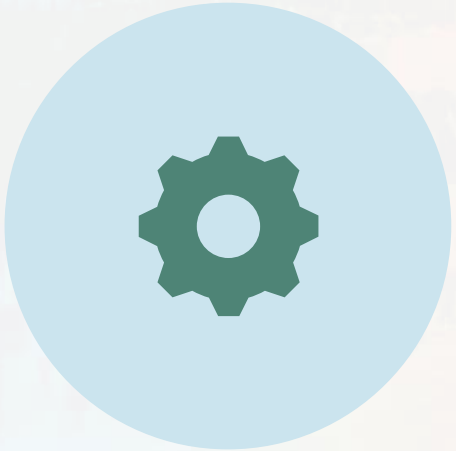
PeopleSoft Chatbot Overview

Terminology

- Chatbot, Digital Assistant, Skill?
- Oracle Digital Assistant
- Utterance
- Intent

Chatbots – Minimum Requirements

ORACLE DIGITAL ASSISTANT CLOUD-BASED SUBSCRIPTION



PEOPLETOOLS 8.57.07 OR HIGHER

HCM PI 31, FSCM PI 33, ELM 20, CAMPUS 15, CRM 18

Chatbot Integration Framework

Delivered as part of 8.57.07, the Chatbot Integration Framework was delivered. It includes:

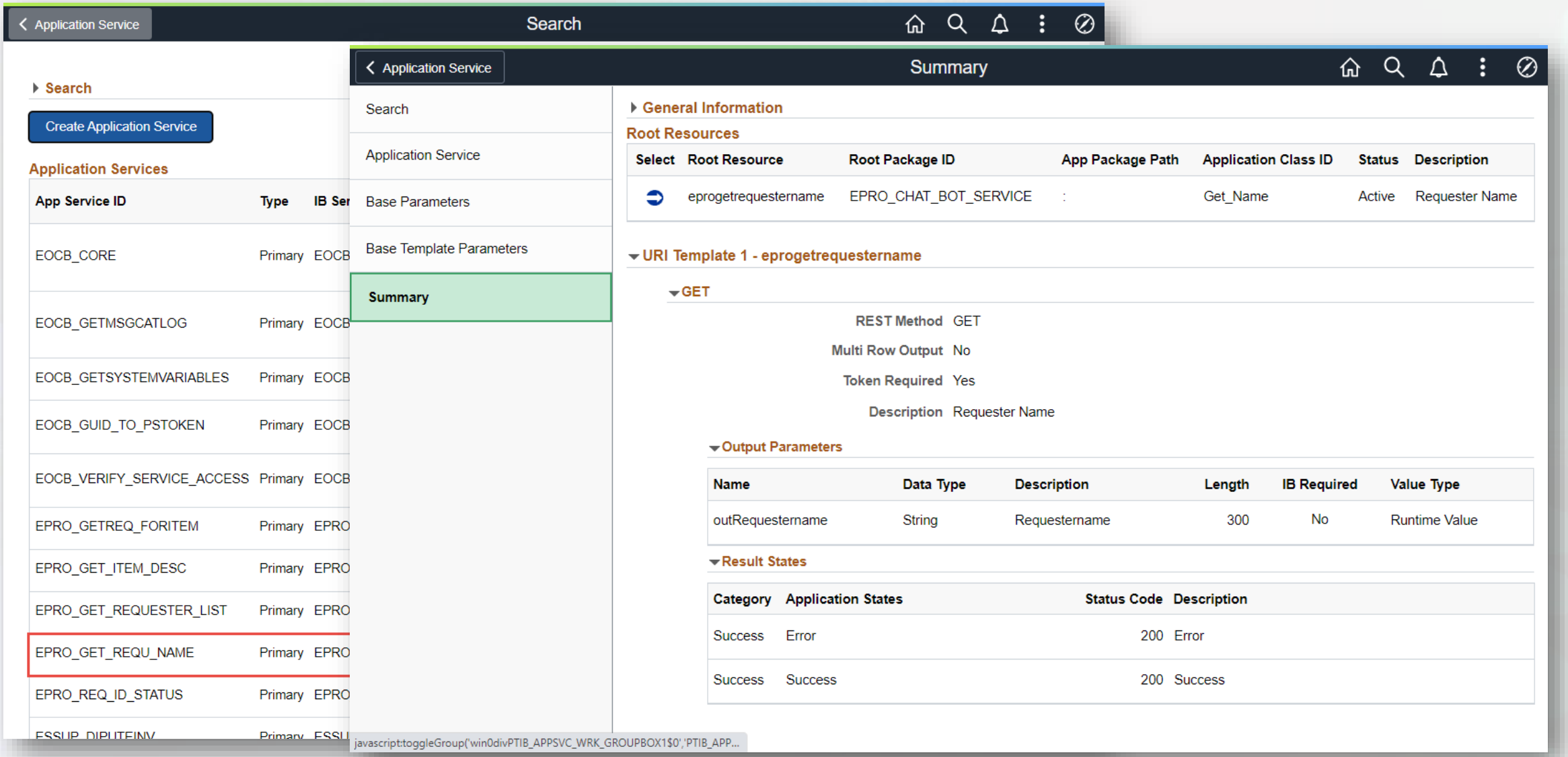
- PeopleSoft Config updates
- Installs for Web Server
- Skills to be imported into Oracle Digital Assistant

Chatbot Integration Framework

PeopleSoft

- App Services Core (Reusable components for all chatbots, e.g. Security authentication)
- App Services per application/bot (e.g. extraction of absence info or requisition data)
- Setup pages (Enterprise Components)
- Chat Client

Chatbot Integration Framework



Chatbot Integration Framework

PeopleSoft Web Server
- Web SDK for Chat Client

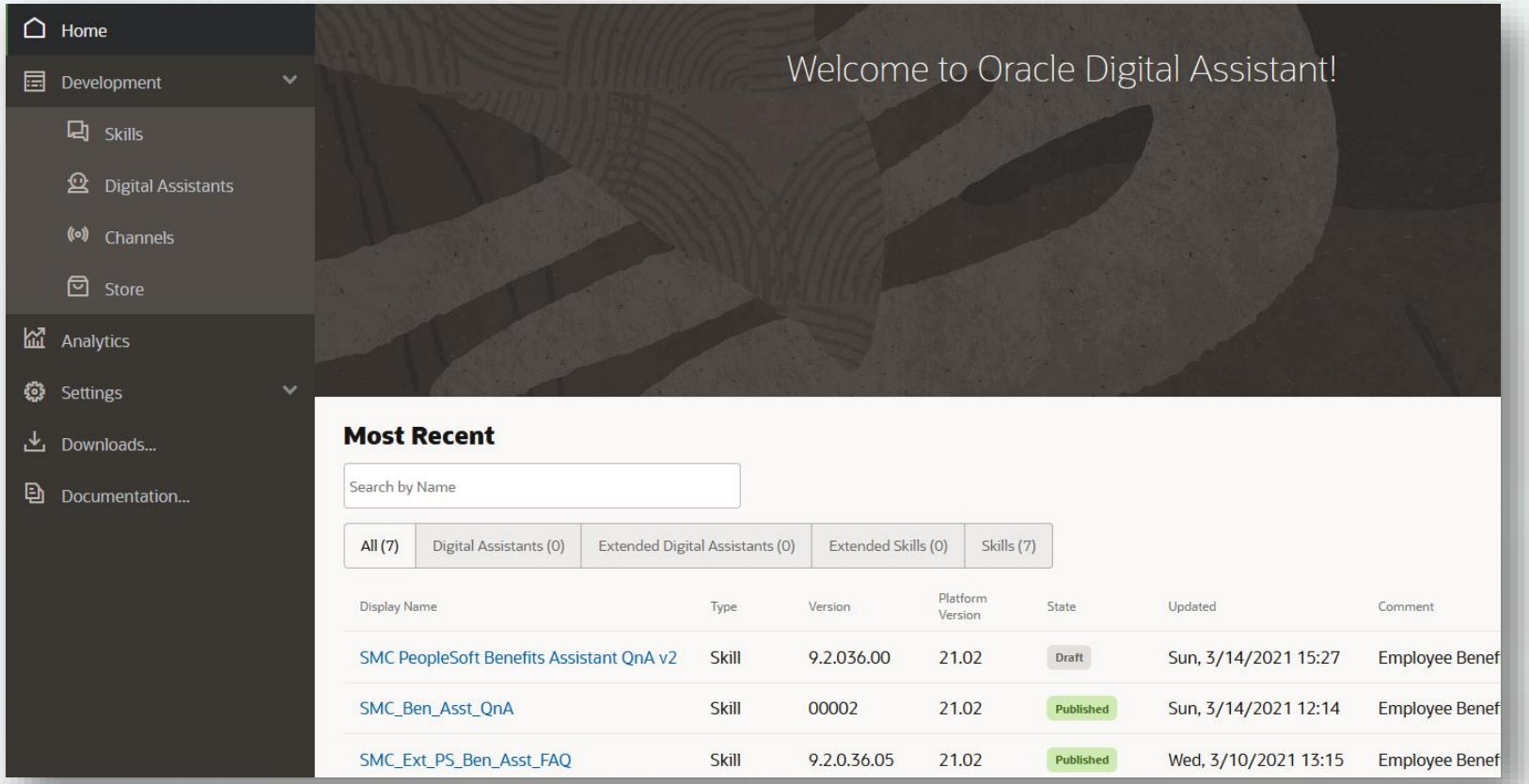
Oracle Digital Assistant
- “Skill” = Chatbot
- Skill Template

Oracle Digital Assistant

Oracle Digital Assistant

Cloud Platform Service available to all customers (on prem or cloud)

- Skills
- Intents
- Entities
- Dialog Flows

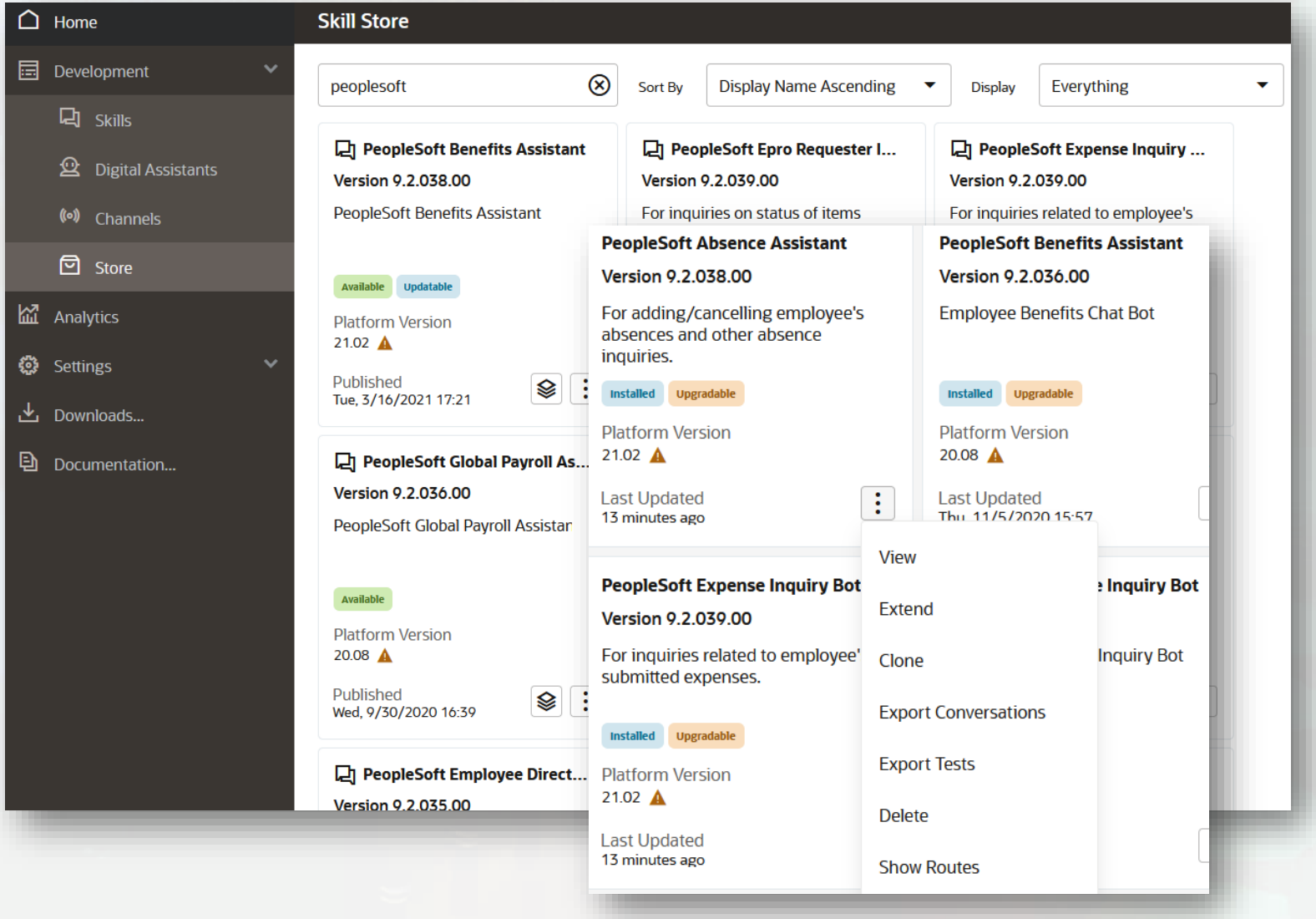


Oracle Digital Assistant

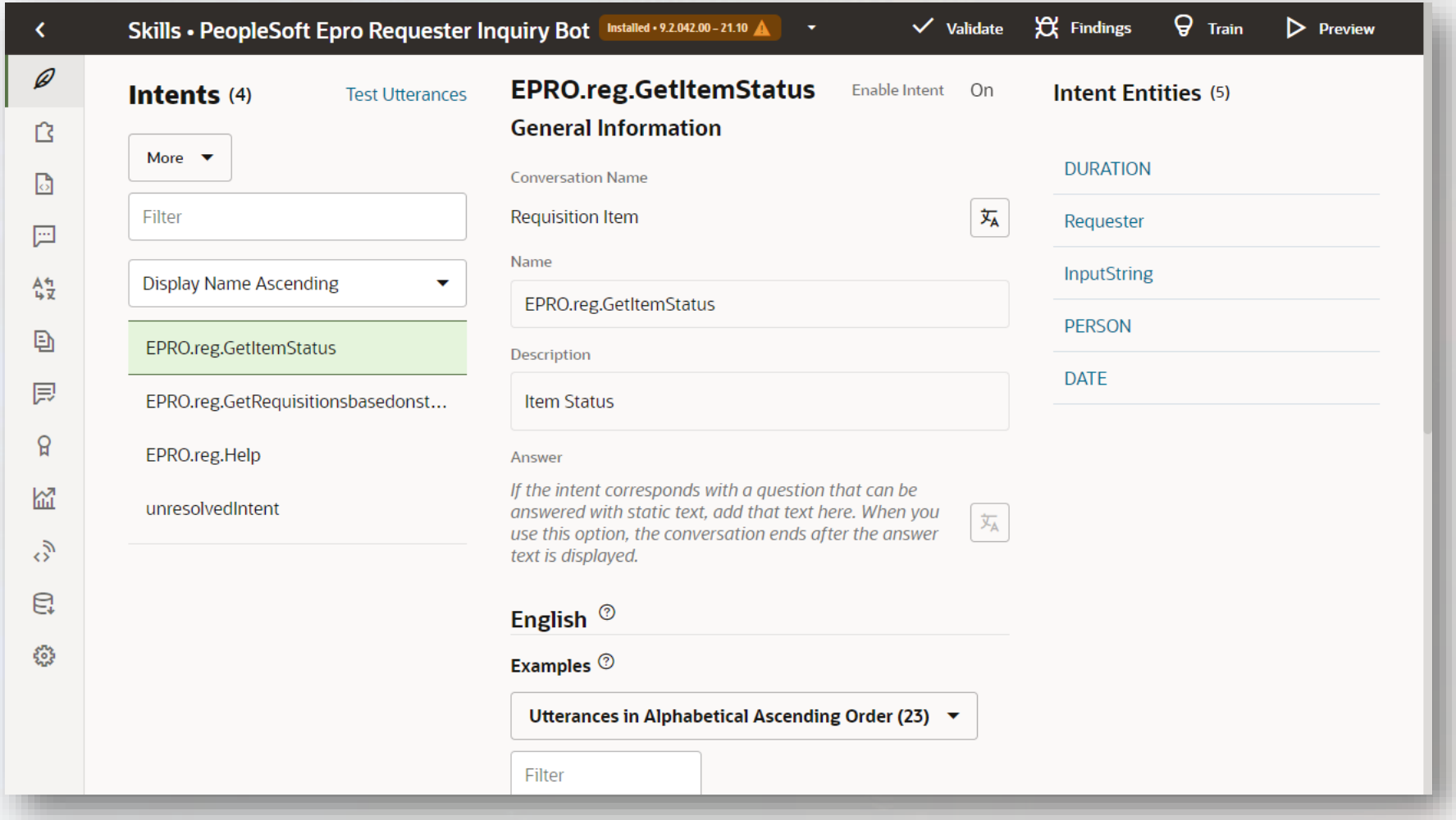
Skills are prebuilt templates

Can be Extended or Cloned

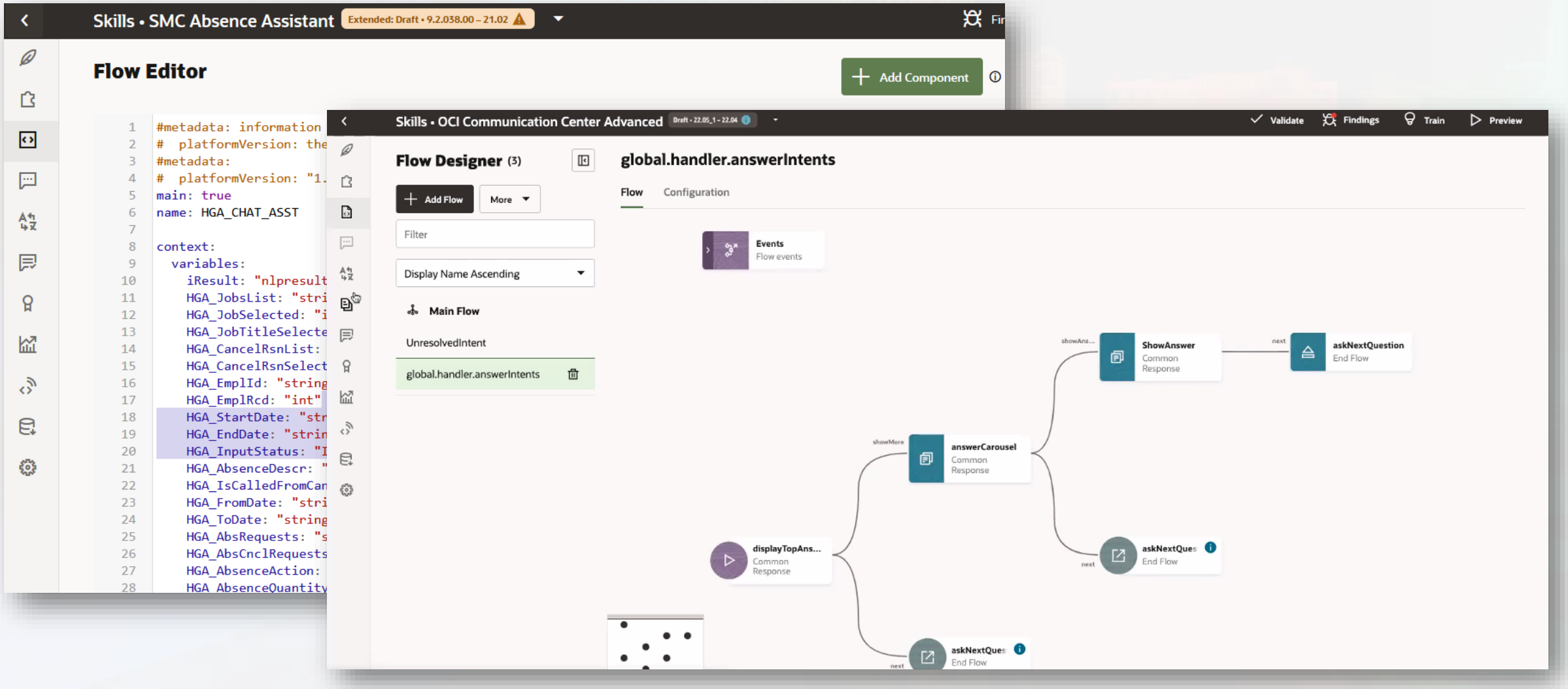
One skill per PeopleSoft Chatbot



Oracle Digital Assistant



Oracle Digital Assistant



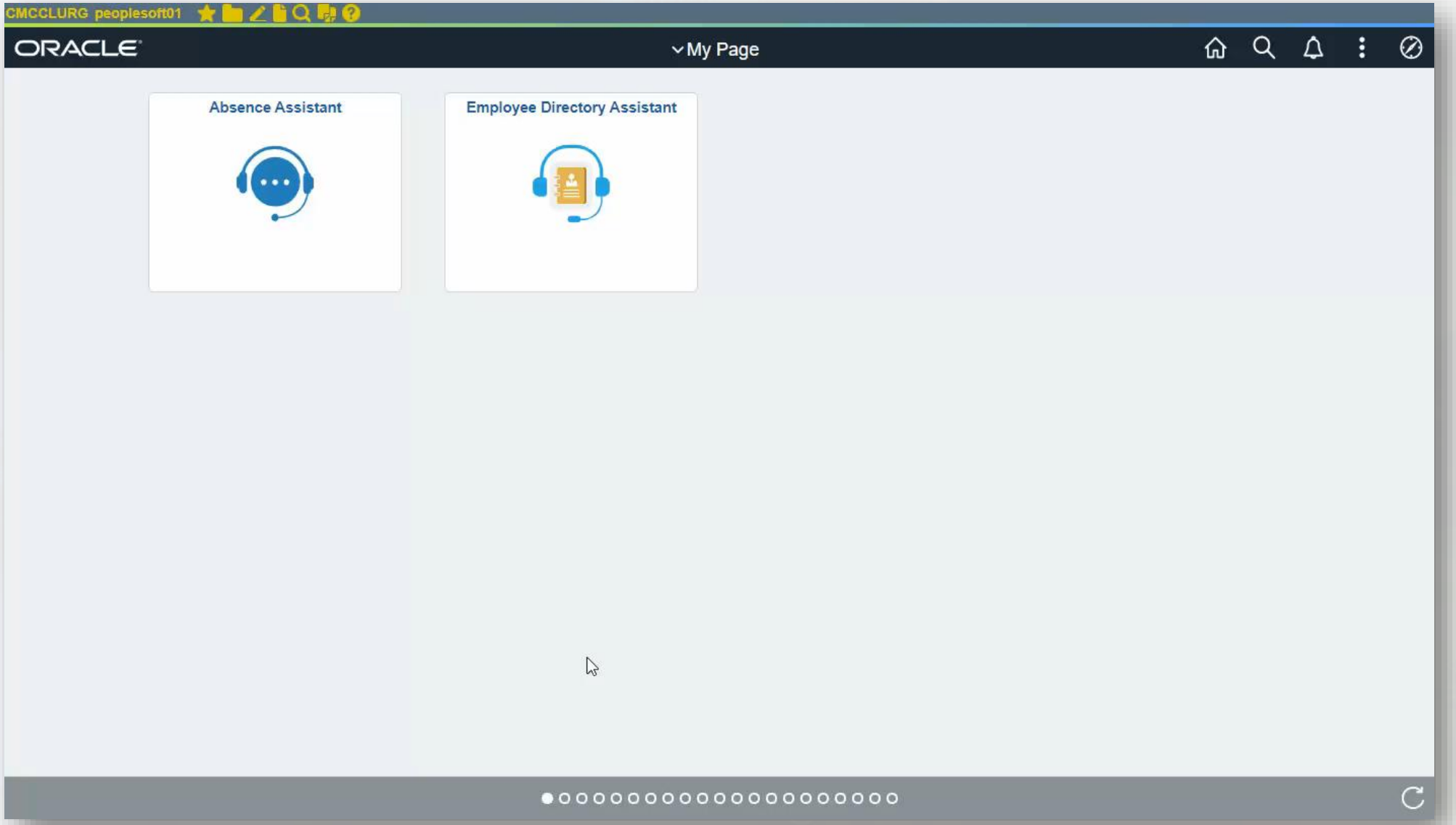
Oracle Digital Assistant vs. PeopleSoft

ODA	PeopleSoft
Natural Language Processor (NLP)	Source Data
Create and Maintain Channel to access Chatbot	Underlying application logic using application service framework
Conversational Logic	User Interface for accessing chatbot
Dialog *Flow*	Dialog *Messages*
Connectivity to PeopleSoft	

PICASO Demo

Supplier Secure Demo

Demo with Utterance Update



Focus on Financials

Focus on Financials

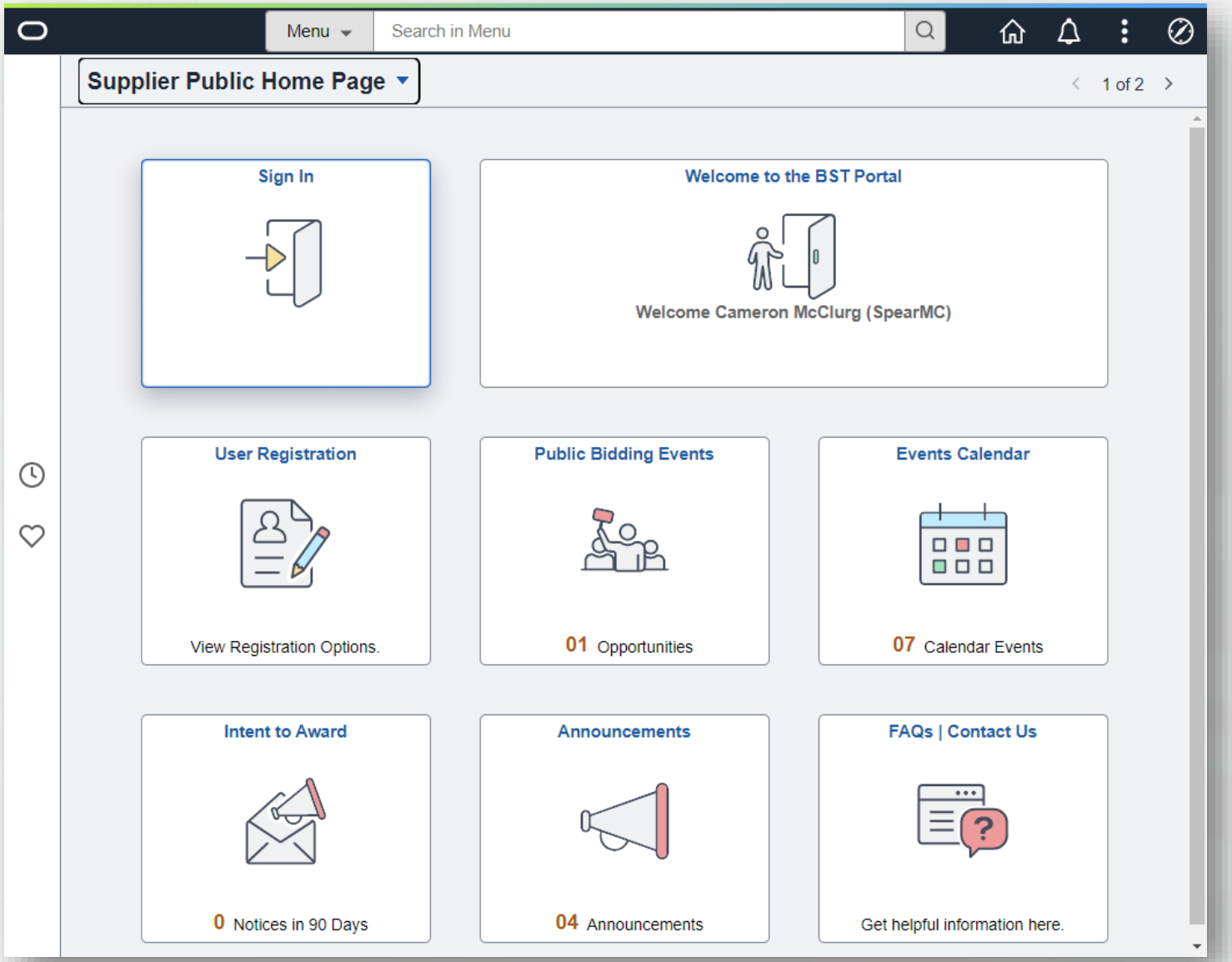
Supplier Public Portal:

- Event Calendar
- Contact Us
- Announcements
- User Registrations for Bidder/Supplier

Coming Soon

- Bidding Opps**
- Awarded Events**

**Requires Strat Sourcing



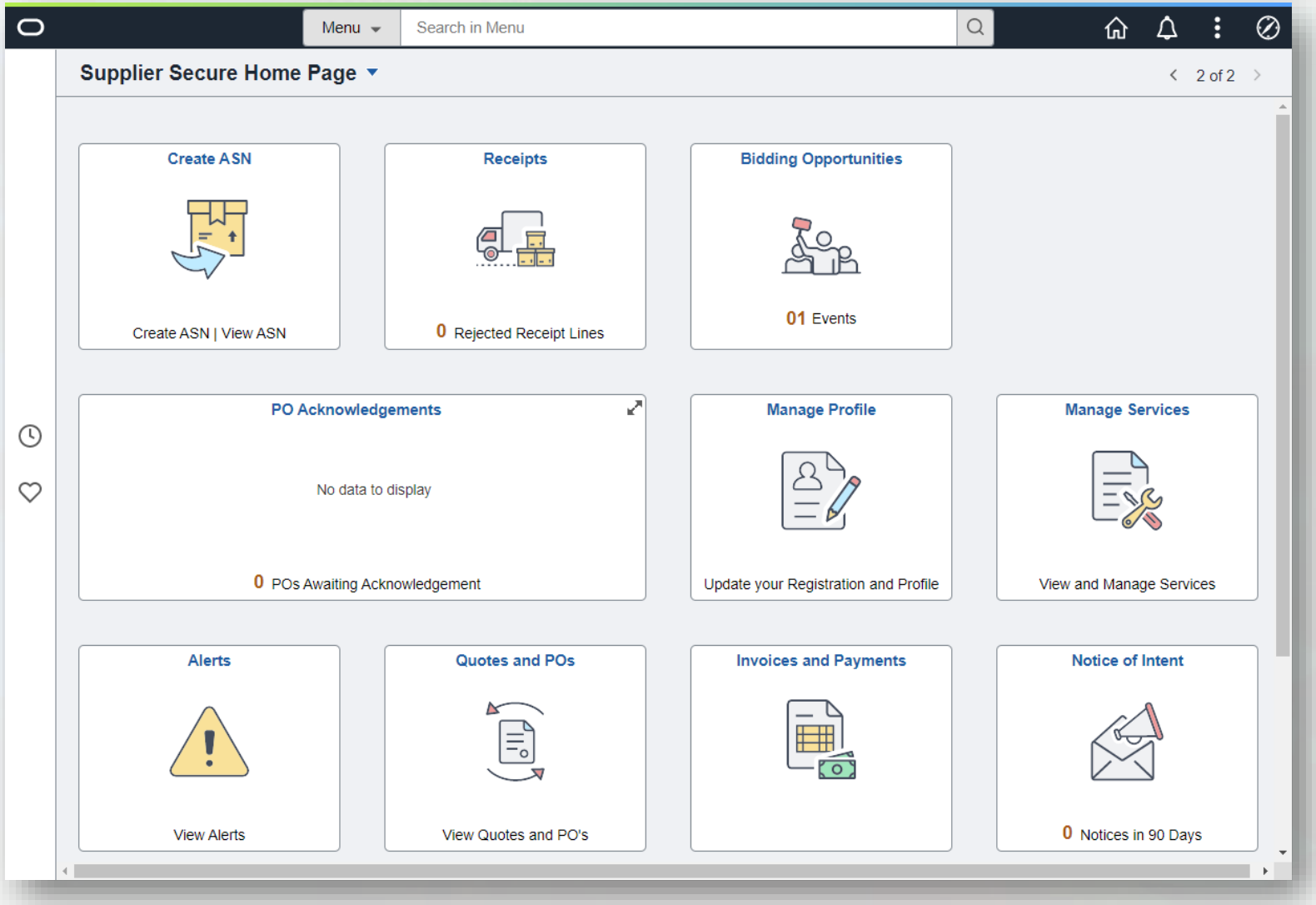
Focus on Financials

Supplier Secure Portal:

- PO Acknowledgements
- Overdue Shipments
- Rejected Receipts

- Invoices in Dispute**
- Open Invoices**

**Requires eSettlements



Cost Considerations and Next Steps

Cost Considerations and Next Steps

Quantitative:

- Time spent answering repetitive questions
- ODA can be licensed as a platform (meaning the more chatbots you deploy, the lower the per request cost and higher the ROI)

Qualitative:

- Customer Satisfaction
- Admin Group Satisfaction/productivity
- Expand Reach/Adoption
- Multilingual support

Cost Considerations and Next Steps

- Business Case Development
- Readiness Planning
- ODA Pricing and Licensing

- PeopleSoft Chatbots Level 1 (1-day)
- PeopleSoft Chatbots Level 2 (3-Days)

- PeopleSoft ODA Integration
- Extending Delivered Chatbots
- Optimize for Custom Usage

- Leverage Chatbot Usage Insights
- Deploy new Chatbot Skills
- On-going Tuning & Optimization

https://spearmc.com/peoplesoft/chatbots/

Conclusion

Chatbots are here…

Increase both User and Admin Group Satisfaction, while increasing productivity of both.

Leverage delivered bots, but personalize it with Utterances and Messaging

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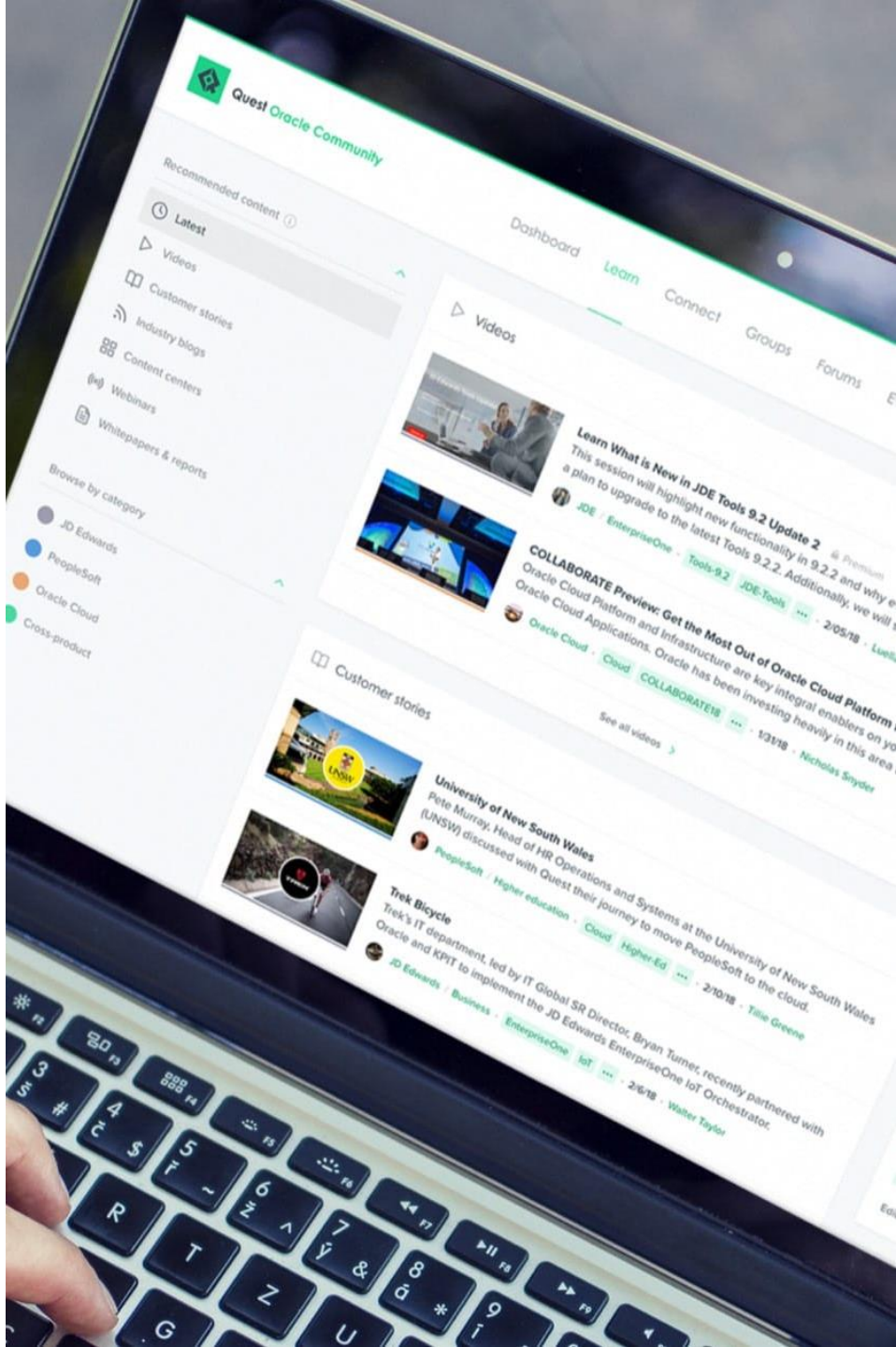

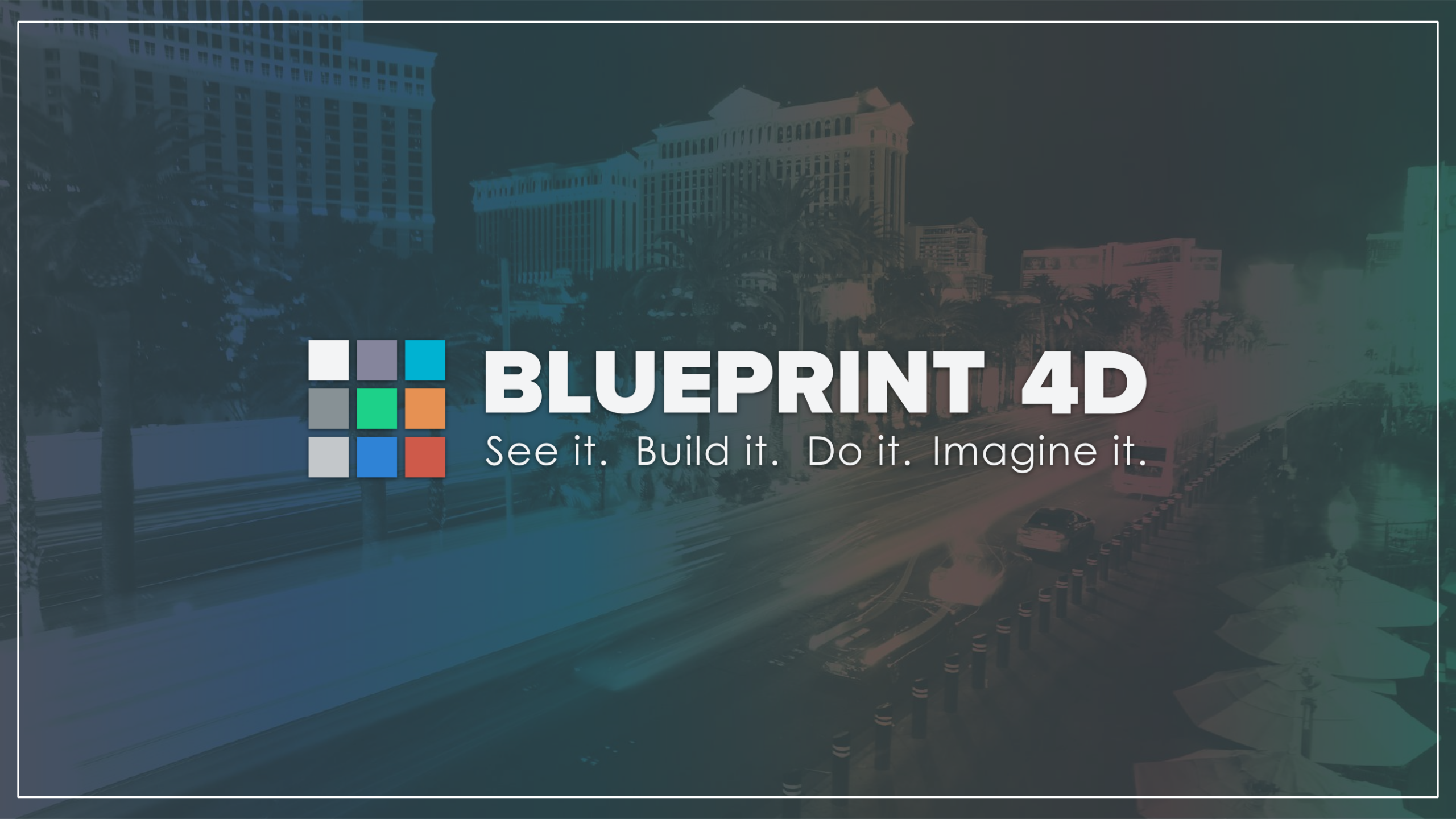
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