

Reconnect Session #100290 - The Road to Kibana:

See how customers in 2023 are paving their way to
OpenSearch and Dashboards via Kibana Data Visualizations

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- 20+ Years of PeopleSoft
- 15+ Years of Enterprise Reporting and Analytics
- Author and Instructor of SpearMC Training
 - Kibana Analytics
 - Open Search Dashboards

Managed Services

- Application Support
- Testing as a Service
- System Administration
- Decustomization

Consulting Services

- Financials and Grants Mgmt
- Supply Chain Mgmt
- Human Capital Management
- Campus Solutions

PeopleSoft Training

- All Access Learning Pass
- Live Private Training
- Oracle Guided Learning
- Oracle University Reseller

Oracle Cloud Platform

- OCI Migration
- Infrastructure Hosting
- Disaster Recovery

Emerging Technology

- Kibana Data Analytics
- Chatbots and Digital Assistants
- Cloud Assessments

Proprietary Products

- PTF Testing Grounds
- Grants: LCD/Effort Reporting
- Supplier Contracts: Authoring
- Lease Admin: GASB 87

Recognition and Specializations

Oracle Specialized

 **Partner**
Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

 **Expertise in PeopleSoft in North America**
SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

 **Expertise in Oracle EPM Cloud in North America**
SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

 **Expertise in Oracle Cloud Platform in North America**
SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

 **Education Reseller**
SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

 **Public Sector Addendum**
Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified



Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest 2023 Gartner Market Guide for Oracle Professional Services.

PeopleSoft Public Training

Learn from an Oracle University Partner

20 Public PeopleSoft Training Classes! Scheduled this coming Nov, Dec and Jan.

Includes new and popular classes for Tools, FSCM, HCM and Campus Solutions:

- OpenSearch Dashboards (formerly Kibana)
- Campus Solutions: Advisement, Admissions, Registration, Communications
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools Bootcamp, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker & REST Web Services
- Basic & Advanced Query for FSCM, HCM and Campus Solutions
- PeopleSoft Test Framework for FSCM, HCM and Campus Solutions

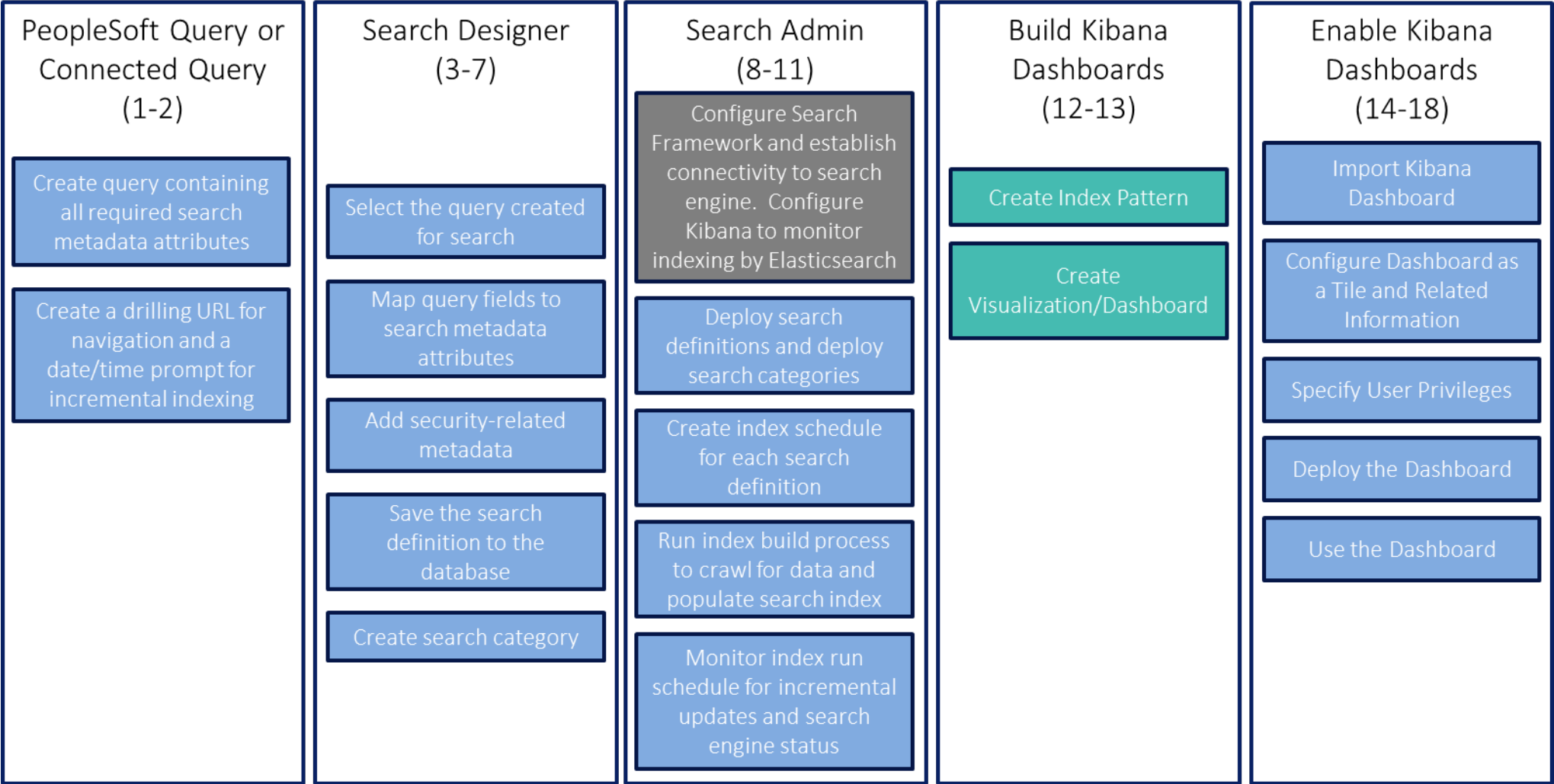


Visit our [website](#) for a full listing of available public courses and free webinars.

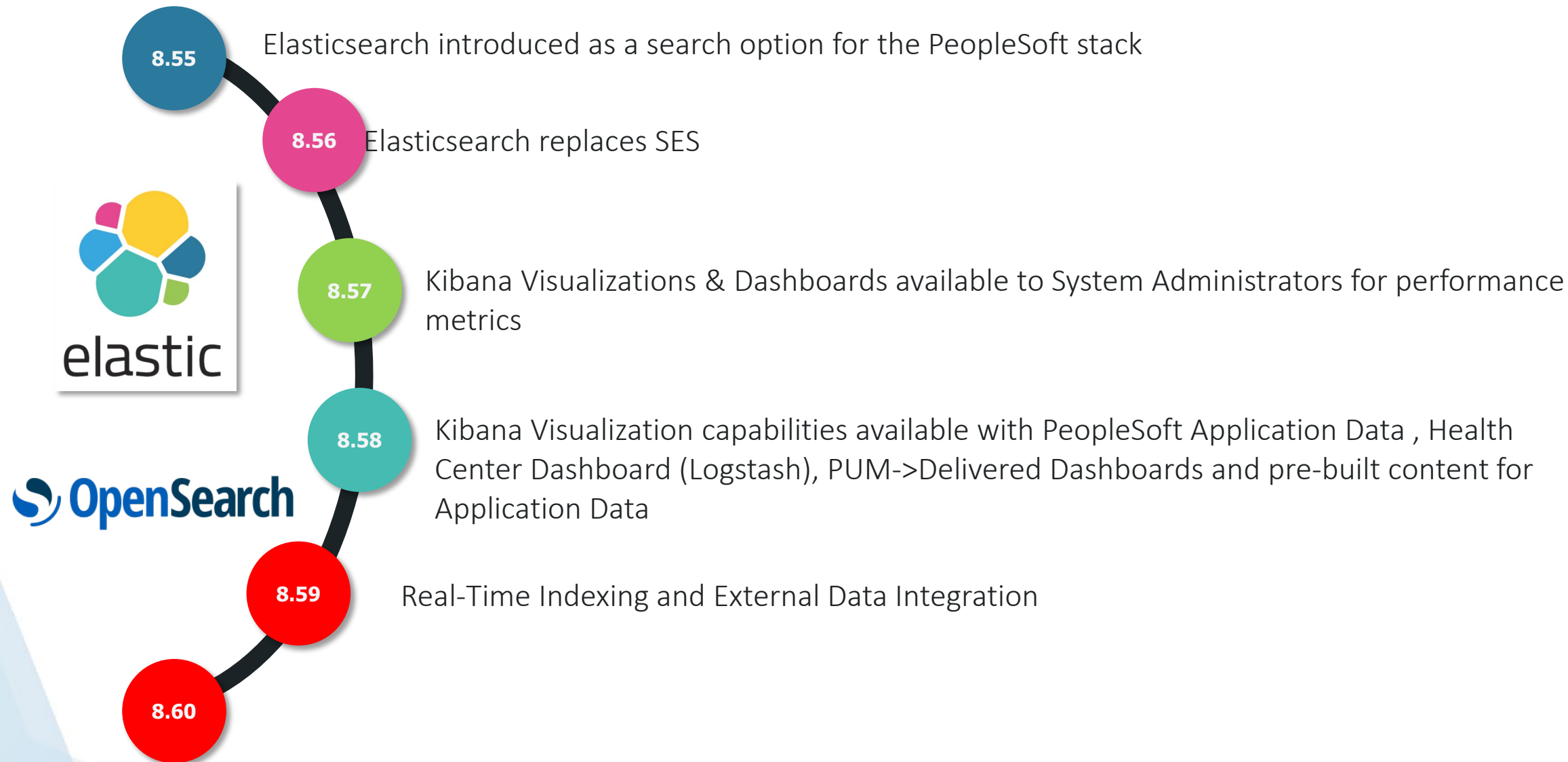
Agenda, Topics and Content

- Open Search/Open Search Dashboards and Elasticsearch/Kibana
- Case Studies and/or Client Examples

Kibana End to End Process Flow



Evolution of Search



PeopleSoft RECONNECT Dive Deep 2023

October 23 – 26, 2023

Kibana End to End Process Flow

	Query	SQR	nVision	BI Publisher	Pivot Grids	OpenSearch /Kibana
Large Data Sets	●	●	●	●	●	●
Built for Speed	●	●	●	●	●	●
Notifications	●	●	●	●	●	●
Advanced Visualizations	●	●	●	●	●	●
Ease of Use	●	●	●	●	●	●
Real Time Data	●	●	●	●	●	●
End User Create	●	●	●	●	●	●
Excel Integration	●	●	●	●	●	●

- Functionality is lacking or n/a
- Functionality is available but not best option
- Best option for functionality

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- ❑ Utilize Delivered Dashboards
- ❑ Clone and Modify Delivered Dashboards
- ❑ Utilize Delivered Indexes, Create Custom Dashboards
- ❑ Clone and Modify Delivered Indexes, Create Custom Dashboards
- ❑ Custom Indexes and Custom Dashboards

- HCM

- Absence Event Insights
- Application - External vs Internal
- Application Details
- Benefits Utilization
- Canada Payroll Cost Analytics
- Canada Payroll Operations Analytics
- Canada Payroll Trends Analytics
- Canada Payroll Trends Analytics Breakdown
- Employee Distribution Dashboard
- Global Payroll Insight Home
- Global Payroll Insights
- Global Payroll Operations
- Global Payroll Trends
- GP Trends Payroll Category Breakdown
- In Process Applications
- Incident Analytics
- Payable Time Insight
- Payable Time Trend
- Recruiter Pipeline
- Recruitment Admin Dashboard
- Remote Worker Dashboard
- Remote Worker Distribution
- Remote Worker Insight
- Remote Workers Insights
- Reported Time Insight
- Test Analytics
- U.S. Payroll Cost Analytics
- U.S. Payroll Operations Analytics
- U.S. Payroll Trends Analytics
- U.S. Payroll Trends Analytics Breakdown
- Vaccination Analytics
- Workforce Composition
- Workforce Equity

- FSCM PUM
 - AR Collection Analysis
 - Asset Analytics
 - Billing Analysis
 - Billing Operations
 - Collector Performance
 - Contracts Analytics
 - Controller's Key Metrics
 - Early Detection and Monitoring
 - Financial Performance Analysis
 - Financial Position Trending
 - GL Operational Insights
 - Item Lots Approaching Expiration Date Dashboard
 - My Budget
 - My Proxy Expense Activity
 - Non-Viable Item/Lot Analysis
 - Performance & Operations
 - Procurement Contracts Dashboard
 - Project Billing Analytics
 - Project Cost Analytics
 - Project Revenue Analytics
 - Purchasing Effectiveness Dashboard
 - Purchasing Operations Dashboard
 - Travel Policy Violations
 - Trend Analysis
 - Work Order Asset Maintenance History
 - Work Order Labor Assignments
 - Year-Over-Year Asset Analytics
 - Year-Over-Year Project Analytics

Delivered Search Indexes

Benefits

Health Benefit

Compensation

Compensation History

Compensation Total Rewards

ePerformance

Development Tips - Competencies

Development Tips - Sub Competencies

Development Tips

Performance Documents

Results Writer - Competencies

Results Writer – Sub Competencies

Absence Management

Absence request search

Absence Balance

Payroll

Create Additional Pay

Create General Deduction

Review Garnishment Search

Common

All Applicants

Application Profiles

Applicant Index

Data Mapping

Job Posting Profiles

All Job Openings

Job Posting

Time and Labor

Time and Labor Time Sheet

Human Resources

Career Plan

Person

Job Data

Person

Succession Planning

Workforce Diversity

Profile Management

Job Profiles

Person Profiles

Delivered Search Indexes

Assets

AP

Financial Sanctions Addresses
Financial Sanctions Names
Payment
Suppliers
Supplier Conversation
Vouchers

AR

Item Search
AR Payment Search
AR Payments

Billing

Contracts

CA Contracts Search
Active Contracts Analytics
Supplier Contracts Clauses
Supplier Contract Clauses (EffDt)
Supplier Contracts Doc Configurators
Workbench Adhoc Docs
Workbench Sourcing Docs
Workbench Contract Docs
Workbench PO Docs
Adhoc Documents
Purchasing Contract Documents
Purchase Order Documents
Sourcing Event Documents
Supplier Contracts Sections
Supplier Contract Sections (EFFDT)

Expenses

Expense Report

Front Office

Contact Search
Customer Search
PeopleMatch
PeopleSearch
Order Search

GL

GL Journal Search
GL Journal Search for Kibana
GL Ledger Search for Kibana

Grants

GM Award Search

Order Management

- Customers
- Bill To Customers
- Ship To Customers
- Sold To Customers
- Catalog customer products
- Non-Contracts catalog products
- Catalog UPC Products
- Catalog UPN products
- Catalog customer UPN products
- Non-catalog customer products
- Non-catalog, non-Contracts products
- Non-catalog UPC products
- Non-catalog UPN products
- Non-catalog customer UPN products

Procurement

- PO Contracts
- Purchase Orders
- Receipts
- Requisitions
- eProcurement Express Items
- eProcurement Items with Suppliers
- eProcurement Items without Suppliers
- Resource Assignment
- Service Provider search
- Service Provider Component Search

Strategic Sourcing

- Sourcing Events

Work Order Management

- WM Asset Search
- WM Technician Search
- Maintenance Work Orders
- Maintenance Assets

Resource Management

- Job Spy and Manage Utilization
- Service Order
- Express Search/Fulfill Orders

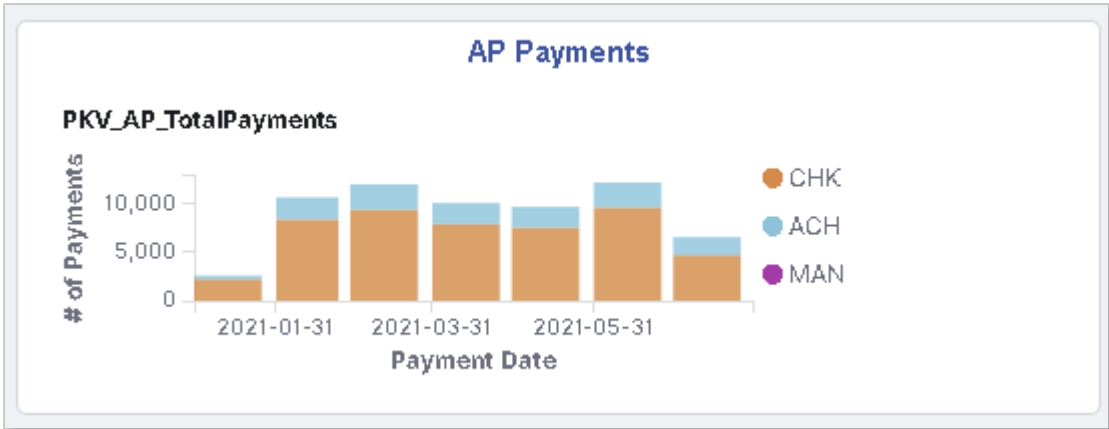
Projects

Kibana Customer Example #1



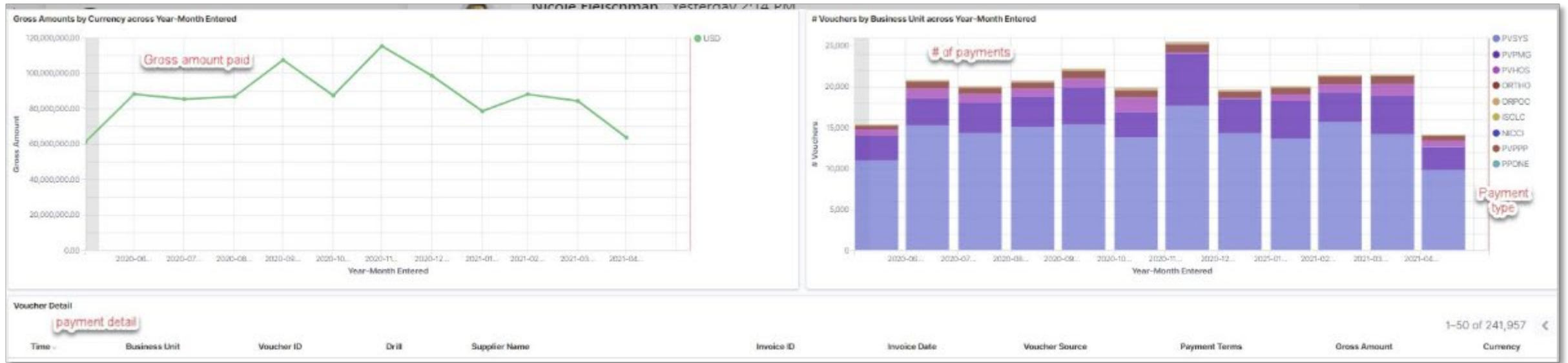
Parkview Health

- Environment:
 - Financials 9.2 PUM 37
 - PeopleTools 8.58.05
- Rolled-out delivered dashboards
- Requirement
 - Create New Kibana Dashboard for AP Payments





Kibana Customer Example #1



Does Kibana have any charts on payments? Everything we have is based on # of vouchers, but sometimes I get asked for # of payments.

Like format of **Trend Analysis** - It shows total gross amounts, total vouchers by day, and vendor details as voucher details.

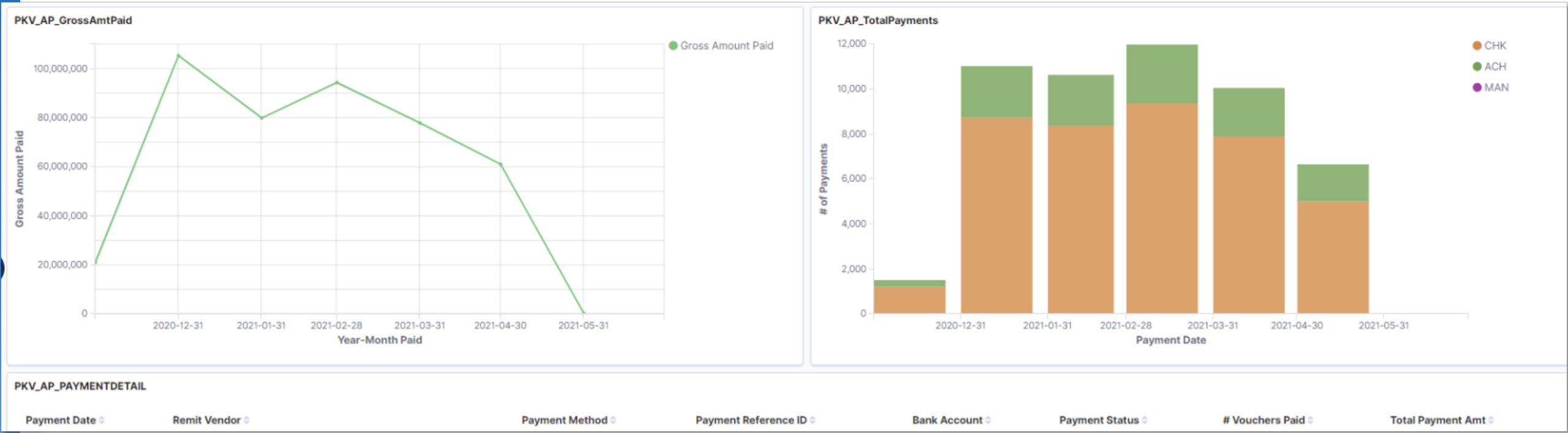
Can we do something similar but with payments? I do like the option of knowing what type of payments if that can be added to the total payments chart (like business units are there now)

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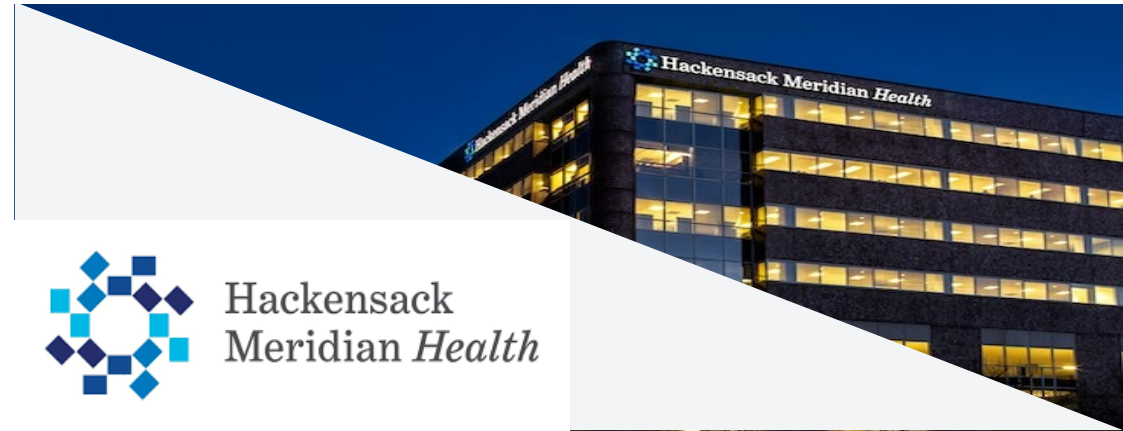


Kibana Customer Example #1



Utilizing the delivered Elasticsearch Index: EP_AP_PAYMENTS.

Kibana Customer Example #2



Hackensack Meridian Health

- Environment:
 - Human Capital Management PUM 36
 - PeopleTools 8.58.08 -> 8.59
- Requirement
 - Produce IT Capital Labor Dashboards with cost breakdowns at various levels

	ITCL_detail View SQL.sql 10 KB	▼
	ITCL_Cost View.sql 10 KB	▼
	ITCL_Hours View.sql	⋮



Hackensack
Meridian Health

Kibana Customer Example #2

IT Capital Labor Report (Comparison)													
Same data as ITCL Hours Only Report - includes 2 months to compare													
Hackensack Meridian Health													
Capital Labor IT Comparison - 2021 (Feb-March)													
Manager	March 2021		February 2021		Increase / Decrease		Example Drilldown						
	Total Hours	Capital Hours	Total Hours	Capital Hours	Total Hours	Capital Hours	CC#	Department	Manager	Name	Empl ID	Project on Time Report	Project Name
Ahichandani,Prem P	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Simon,Heidi Ann	1015576	ITCL_2021_011	Other IT Operating Project
Ahluwalia,Kawaljit S	1264	0	0	0	1264	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Rongione,Frances	1015570	ITCL_2021_011	Other IT Operating Project
Bacilit,Teresa C	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Morgan,Barbette	1015572	ITCL_2021_002	Security Remediation
Barbee,Rodney E	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Lewis,Eugene	1015578	ITCL_2021_011	Other IT Operating Project
Belko,Kathleen	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Dopko,Christoph	1015571	ITCL_2021_011	Other IT Operating Project
Benson,Brian J	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Cullari,Gregory	1015574	ITCL_2021_011	Other IT Operating Project
Blaney,Patricia	0	0	0	0	0	0	1008476	IT - Business Applicatic	Ahluwalia,Kawaljit	Castor,Maureen	1015575	ITCL_2021_002	Security Remediation
Bruno,Frank M	0	0	0	0	0	0							
Bryant,Kevin	0	0	0	0	0	0							
Cassell,Ann M	0	0	0	0	0	0							

Create a Fully Custom Cost of Labor Report

Formal spec with data requirements – various SQL views

- Intro to Kibana
- Requirements Deep Dive
- Create a combined SQL View
- Build Elastic Index
- Create in Kibana

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Kibana Customer Example #2

Project Labor Report (For managers)

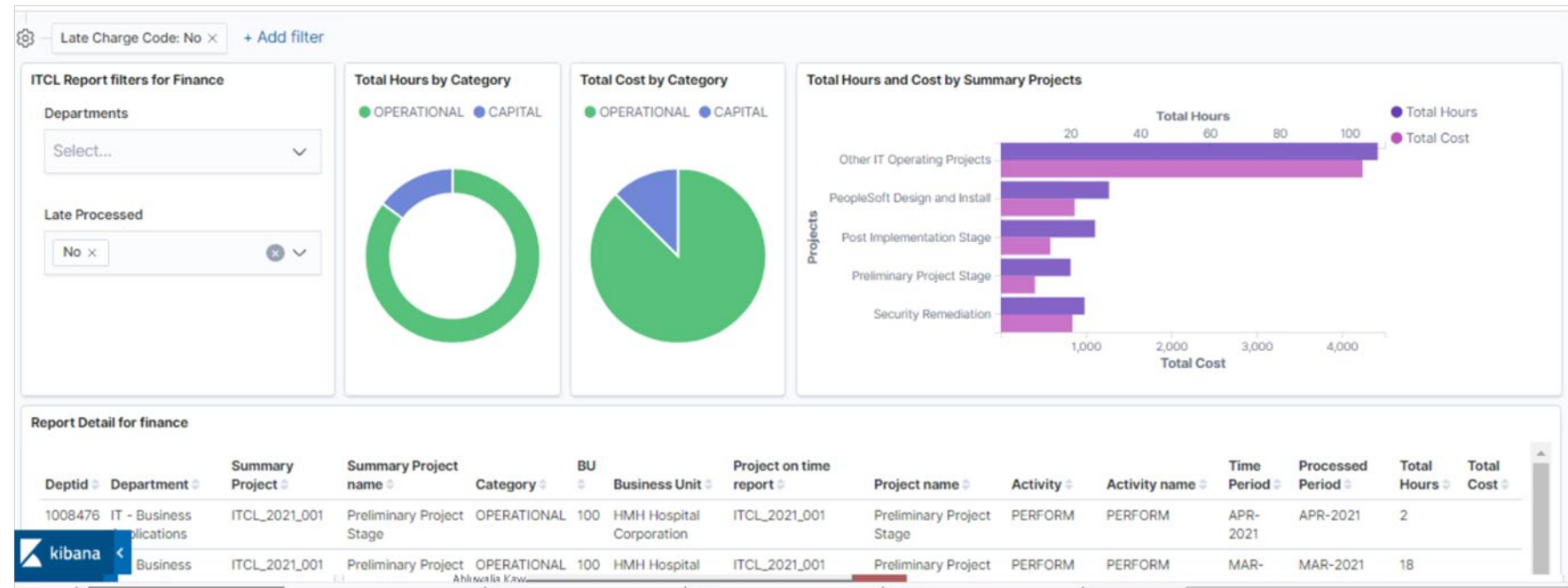
- Total hours spent by department/leader/Team member
- Total hours by category
- Total hours by Summary project
- Total hours for each team member for their assigned projects.
- Report details at the bottom that can be downloaded in excel/csv



Kibana Customer Example #2

IT Labor cost by department (For finance)

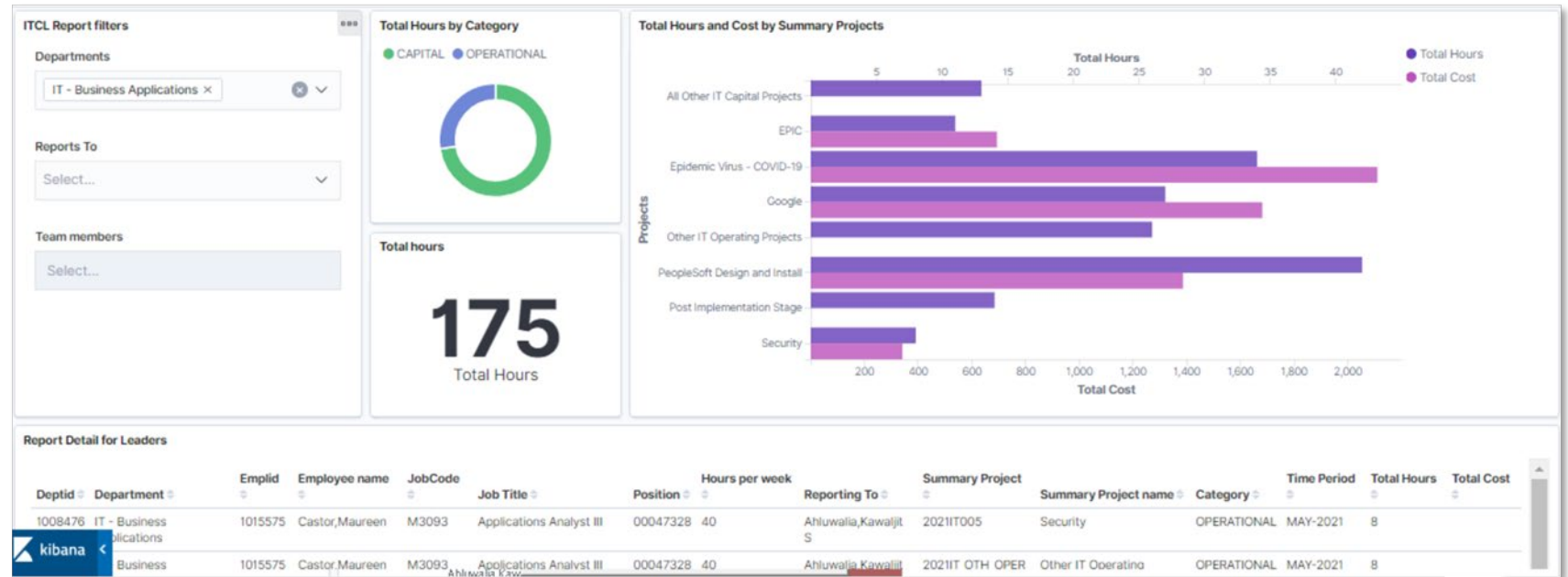
- Total hours and cost for departments / any late processed transactions
- Total hours and cost by category
- Total hours and cost for each project
- Report details at the bottom that can be downloaded in excel/csv



Kibana Customer Example #2

IT Labor report (For IT leaders)

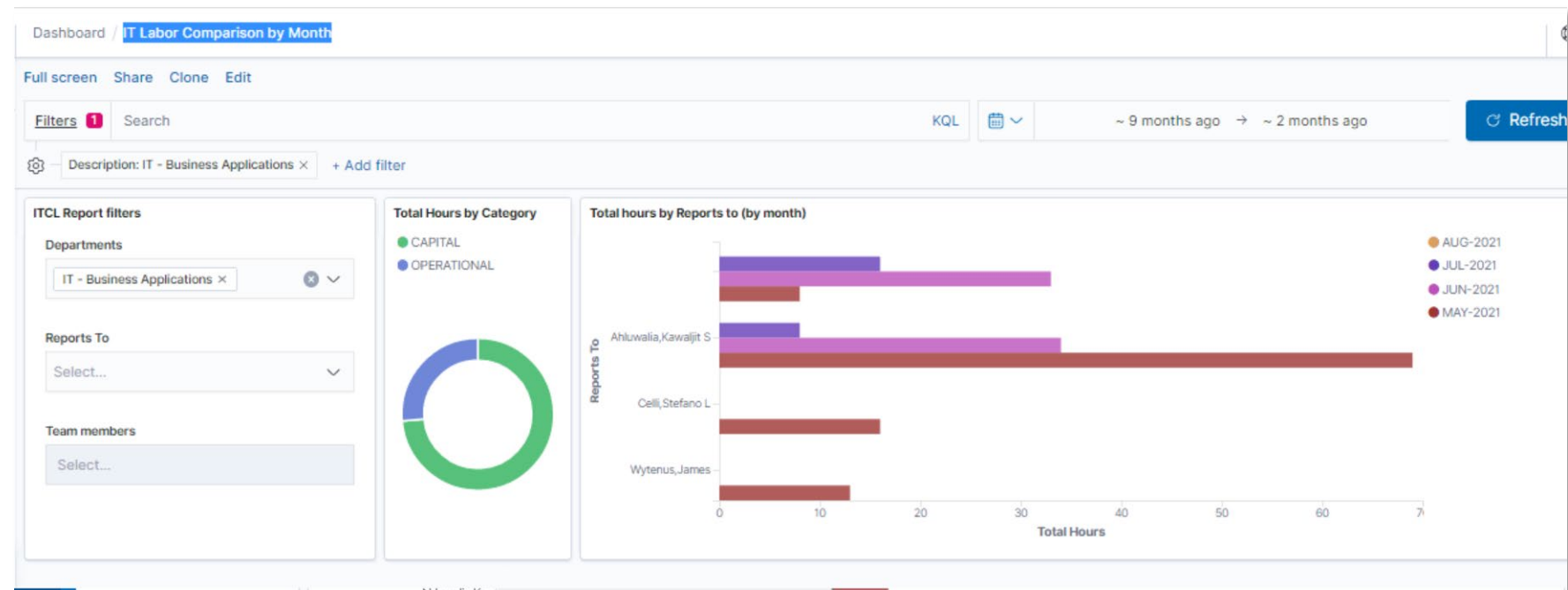
- Total hours by department/leader/Team member
- Total hours by category
- Total hours and cost by Summary project (helpful to find out special projects and its resources like COVID-19 in this example)
- Report details at the bottom that can be downloaded in excel/csv



Kibana Customer Example #2

IT Labor Comparison by Month (For leaders : month by month comparison)

- Total hours by department/leader/Team member
- Total hours by category
- Month by month comparison for Total hours spent by managers(project leaders)



Kibana Customer Example #2

Other Challenges and Opportunities

- Certificate issue in 8.58
- Upgraded environment without Kibana in PRD
- Drilling Down to Other Dashboards
- Region Map Drill down on multiple layers
- Coordinate Map (Vector/Geo Spatial)
- Hiding some filters and controls

Move forward with Analytics in PeopleSoft

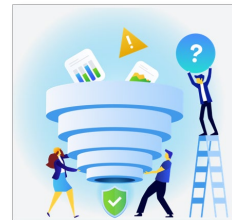
- Reporting **Inventory** & Requirements



- Fit/Gap Against Delivered



- Rationalize Reporting Requirements

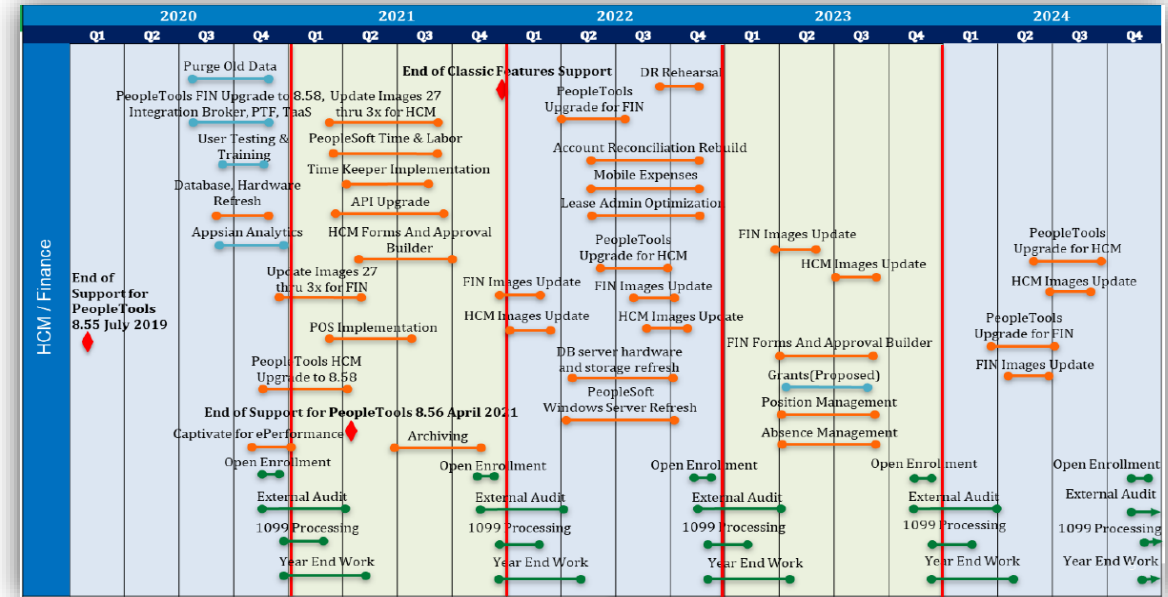


- Iterative Design and Build



Your Strategic Roadmap

- Upgrade to PeopleTools 8.59+
- Familiarize yourself with Search Indexes
 - Index customized fields if you want to report on them
- Leverage delivered content
 - Get Current/Stay Current
- Partner with an expert
 - Training and/or Consulting
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Contact me:

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Session ID:

100470



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PeopleSoft
Community



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AND CLICK **RATE SESSION** TO
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PeopleSoft

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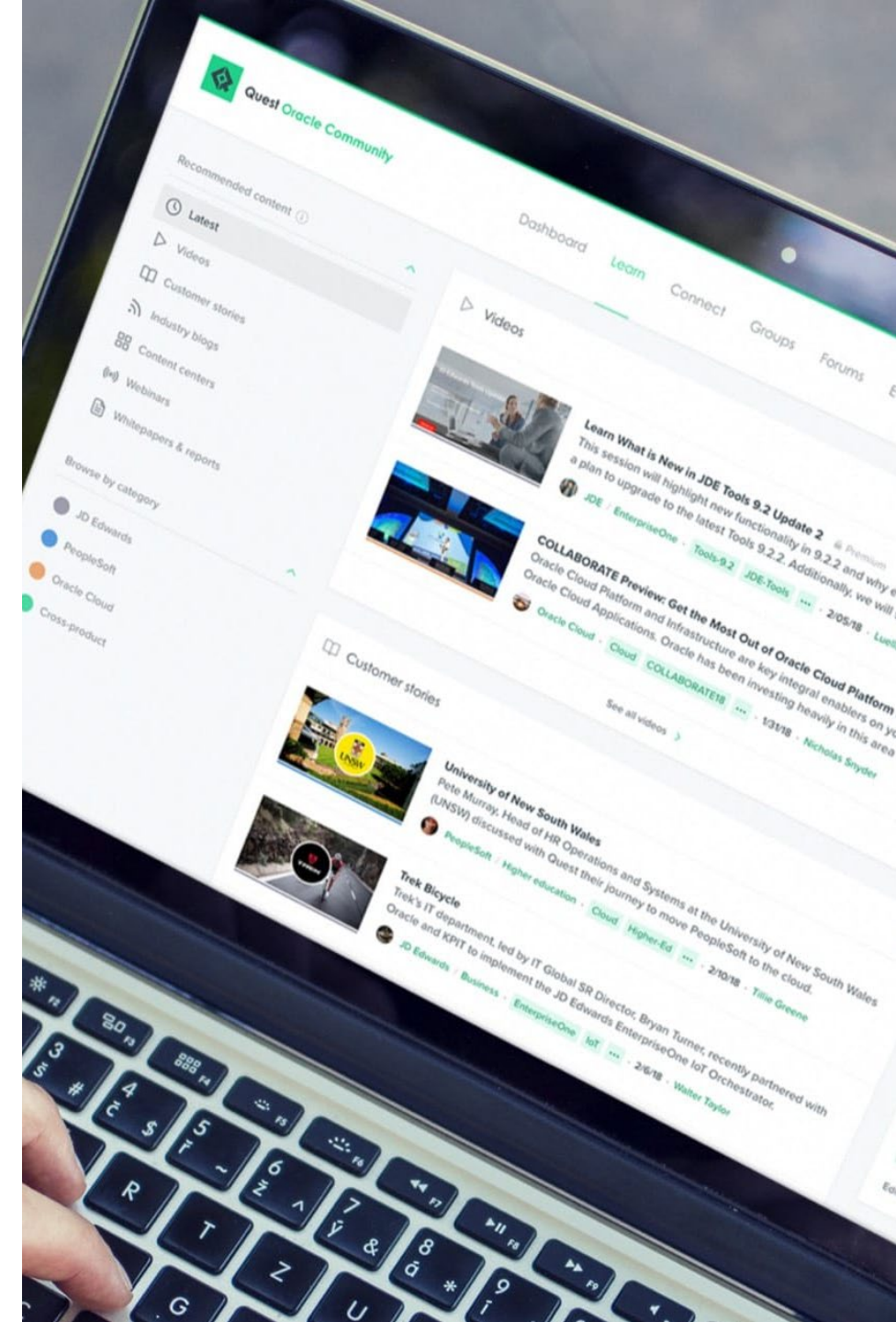
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APPENDIX

SpearMC Sessions

Date	Time (ET)	Session Title	Session #
24-Oct-23	10:30 AM	PeopleSoft Expenses at HHM: Featuring Google Maps Integration, Fluid UI, and Duo MFA Security Randall Johnson & Gary Wilhelm	100390
	11:30 AM	A Panel Discussion on the Move to OpenSearch in PeopleSoft Sasank Vemana, Gary Dranikoski, Kanchan Singh, Rajesh Thiru & Dan Iverson	101850
	12:45 PM	OGL: Real Time Guided Processing for Students, Applicants, Employees, Suppliers and Customers Cameron McClurg	DEMO
	1:15 PM	Getting the Best Out of delivered Kibana Visualizations in PeopleSoft HCM Logesh Balasubramaniam	DEMO
	2:15 PM	PeopleSoft Procure-to-Pay Optimization and PTP Assessment Case Study: Hackensack Meridian Health Tom Tretter & Gary Wilhelm	100480
	3:30 PM	Learn PeopleSoft Today, Invest in Your Future with PeopleSoft AALP. Product Demonstration for PeopleTools, FSCM, HCM and Campus Solutions. Marcus Bode & Susan Caranante	DEMO
	4:45 PM	Automating Grants Billing in a Matrixed Organization Jessica Mann & Trecia Leung	100430
	4:45 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned! Randall Johnson & Sanjay Todi	100710
25-Oct-23	10:30 AM	Achieve a Seamlessly Integrated Time, Absence, Payroll Management using PeopleSoft HCM Logesh Balasubramaniam	102000
	12:45 PM	Tips, Tricks and Best Practices with Activity Guides Framework Logesh Balasubramaniam	100670
	2:15 PM	PeopleSoft Automated Testing and PTF Accelerators at NDUS and State of ND Tarunraj Amuthan	DEMO
	2:45 PM	PeopleSoft Grants Labor Cost Distribution and Effort Reporting Solution Jessica Mann	DEMO
	3:30 PM	The Road to Kibana: See How Customers in 2023 are Paving Their Way to OpenSearch and Dashboards via Kibana Data Visualizations Gary Dranikoski & Marcus Bode	100290
	4:45 PM	North Mississippi Health & Memorial Hospital Gulfport: How Efficiencies Built into Atlassian Jira Support Tracking Drive Best Practices & Strategic Projects Visualizations Gary Dranikoski & Clinton Edwards	100470
	4:45 PM	Manage Month End Close with PeopleSoft Activity Guides Randall Johnson & Sanjay Todi	100690
26-Oct-23	11:00 AM	How to Automate and Control Your Monthly Financial Close Using PeopleSoft Activity Guides Randall Johnson	DEMO
	11:30 AM	Oracle Guided Learning – End User Training Made Easy Jessica Mann & Trecia Leung	100420
	2:15 PM	PeopleSoft ChatBots: Use Case and Best Practices for HCM and FSCM Logesh Balasubramaniam & Cameron McClurg	100400
	3:30 PM	Customer Panel: Oracle Guided Learning Cameron McClurg & Ben Amster	100350

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2023 Training Calendar

November Class Schedule

Nov 14 & 16	PeopleTools 8.58-8.60 Bootcamp
Nov 16	PeopleSoft 9.2 Query Basic and Intermediate for FSCM
Nov 17	PeopleSoft 9.2 Query Advanced for FSCM
Nov 27	PeopleSoft 9.2 Query Basic and Intermediate for HCM
Nov 28	PeopleSoft 9.2 Query Advanced for HCM
Nov 30	PeopleTools 8.58 - 8.60 PeopleCode and Object-Oriented Programming (OOP)

Visit our [website](#) for additional details

2023 Training Calendar

December Class Schedule

Dec 5	PeopleSoft 9.2 Campus Solutions: Student Records & Registration
Dec 7	PeopleTools 8.58-8.60 Fluid User Interface
Dec 11	Automated Testing with PeopleSoft Test Framework for Campus Solutions
Dec 11	PeopleSoft 9.2 Query Basic and Intermediate for Campus Solutions
Dec 12	PeopleSoft 9.2 Campus Solutions: Academic Advisement
Dec 13	PeopleSoft 9.2 Query Advanced for Campus Solutions
Dec 14	PeopleTools 8.58-8.60 Integration Broker and REST Web Services
Dec 15	PeopleSoft 9.2 Campus Solutions: Admissions Applications

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2024 Training Calendar

January Class Schedule

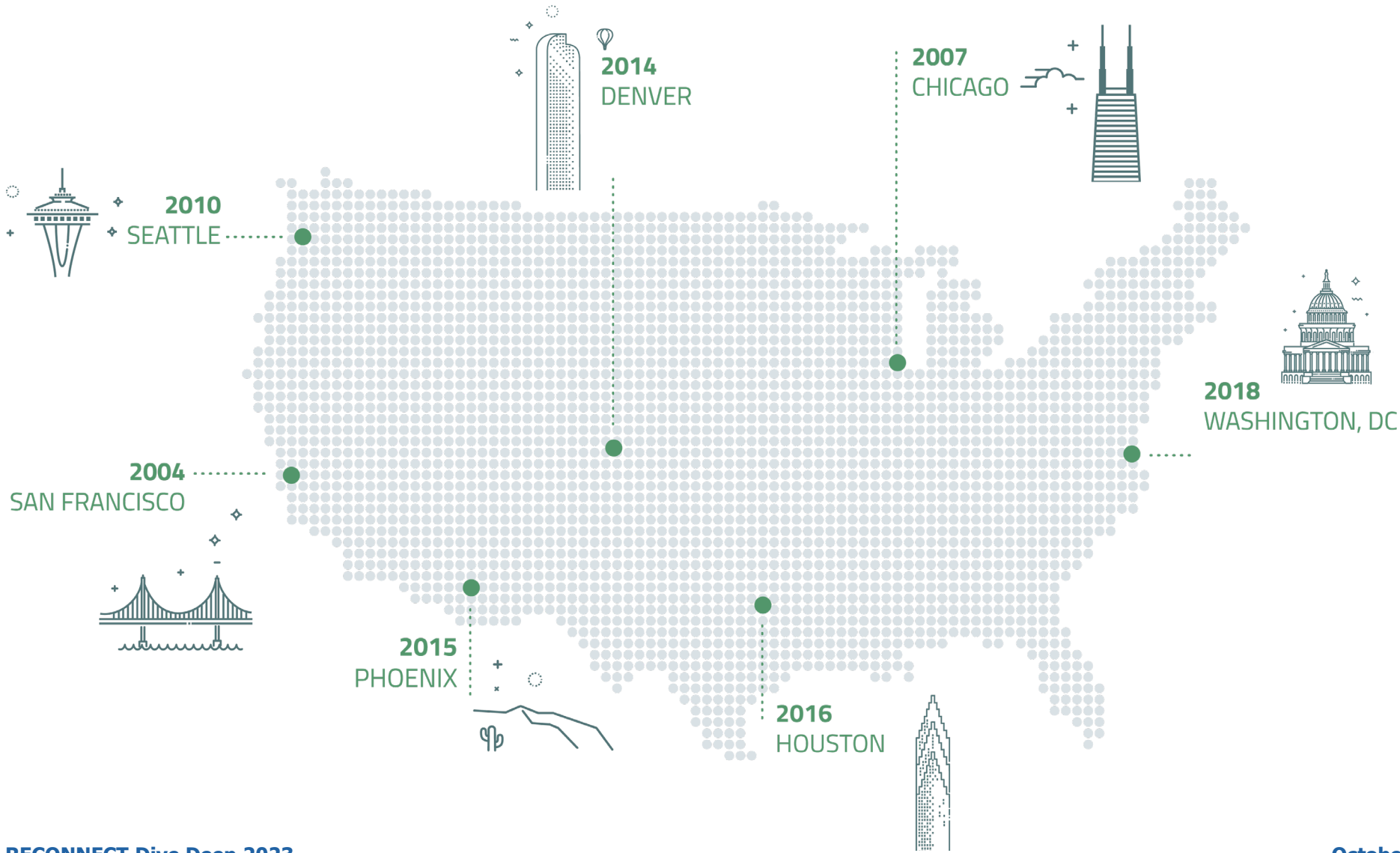
Jan 10-11, 17-18	PeopleTools 8.58-8.60 System Administration
Jan 23	PeopleTools 8.59-8.60 OpenSearch Dashboards (formerly Kibana)
Jan 26	PeopleSoft 9.2 Campus Solutions 3Cs: Communications, Checklists and Comments

Visit our [website](#) for additional details

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Coast-to-Coast Coverage



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October 23 – 26, 2023



Partner

Expertise in
PeopleSoft
in North America

Expertise in
Oracle Cloud Platform
in North America

Expertise in
Oracle EPM Cloud
in North America



Education
Reseller

Gartner
Recognized Vendor



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Trusted Domain Experts

While SpearMC serves a wide variety of organizations, we have deep knowledge in a number of specific industry verticals.



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Streamlining processes to improve outcomes and fuel innovation.



FINANCIAL SERVICES

Mitigating risk and building stronger customer relationships.



HIGHER EDUCATION

Supporting the success of students, staff, and institutions.



PUBLIC SECTOR

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PeopleSoft Managed Services



Testing as
a Service



Infrastructure
Hosting



Technical
Support



Functional
Support



Staying Current



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Maximize budget each month, or put unused time toward a new strategic project.



RELIABLE SUPPORT FROM DOMESTIC RESOURCES

Count on dedicated onshore resources to respond to all requests.



COMPLETE VISIBILITY WITH MONTHLY REPORTING

See exactly what our team worked on and how much value we added.

PeopleSoft Roadmap Specialists

We follow a structured approach for gathering information, analyzing issues, identifying pain points and proposing applicable solutions.

Our recommendations encompass the people, end-to-end processes and technology aspects associated with your PeopleSoft platform.

