

P-036771

RECONNECT Live! Presentation

PeopleSoft ChatBots: Use Case for
Financials and Supply Chain and Beyond

May 9, 2024

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

Meet SpearMC



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Vice President

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Career Focus: ERP Transformation and Automation
Financials, Supply Chain, and HCM Technology

Hometown: Laguna Hills, CA

Recognition and Specializations

Oracle Specialized

ORACLE | 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.

ORACLE | Expertise in PeopleSoft in North America

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

ORACLE | Expertise in Oracle EPM Cloud in North America

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

ORACLE | 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.

ORACLE | 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.

ORACLE | 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



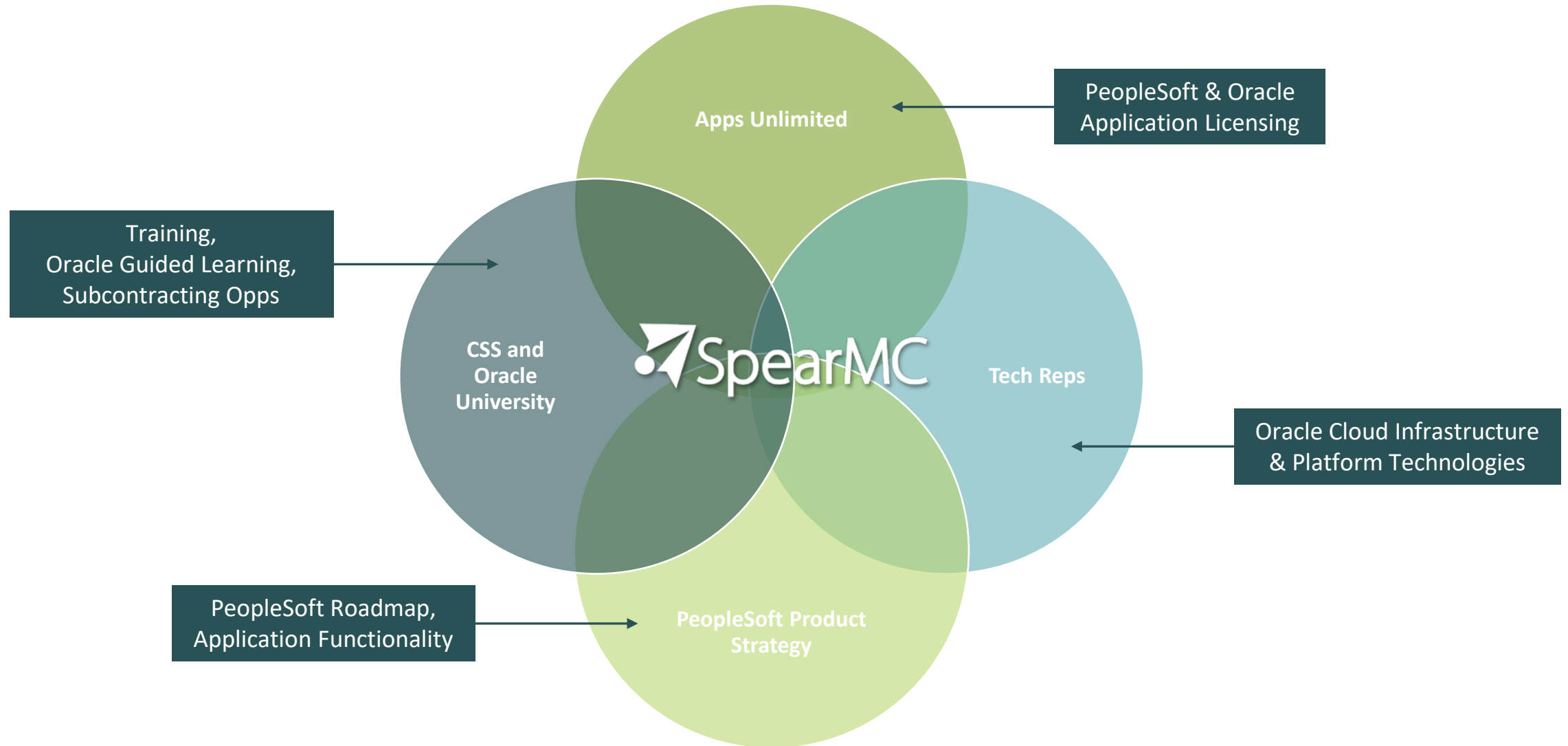
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



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

SpearMC Strategy: Positioning with Oracle



PRODUCTS AND SERVICES

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



- Managed Services

Application Support
Testing as a Service
System Administration
Infrastructure Hosting

- Consulting Services

Financials and Supply Chain
Test Framework
Human Capital Management
Campus Solutions

- PeopleSoft Training

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

Oracle PeopleSoft

- Oracle Cloud Platform

OCI Migration
Infrastructure Hosting
Disaster Recovery

- Emerging Technology

Oracle Assessment
Chatbots & Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

- Proprietary Products

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

PeopleSoft Training Opportunities

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will receive Powerful, Practical Learning Experiences covering PeopleSoft Campus Solutions, Human Capital Management, Financials and PeopleTools:

- HCM Solutions: Core HR, NA Payroll, Benefits
- Campus Solutions: Advisement, Admissions, Registration, 3C's
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools: Security, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker/REST Web Services
- Reporting: OpenSearch Dashboards (formerly Kibana) and Query

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



Scan the QR code to view the full listing of offerings and courses

Agenda

- Chatbot Overview and Value Proposition
- PeopleSoft Digital Assistant (PICASO) FSCM Examples
- Chatbot Deployment Process and Lifecycle
- Enterprise Wide Chatbots (Meet Ida)
- Q & A

Conversational Interface Overview



A conversational user interface (CUI) emulates real human conversation



Instead of learning to navigate, input data, and click the right buttons, CUI's provide opportunity for user to speak naturally and for the machine to learn.
In an increasingly AI driven world, users will demand it

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

Chatbots Value Proposition – Why Implement?

User Experience

- Interactive experience provides ease of use
- Single channel to accomplish multiple related tasks
- No need to know / remember system navigation

Training

- Conversational UI reduces training when deploying new features

On-demand Assistance

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

PeopleSoft Delivered Skills

Finance & Supply Chain Skill Examples

Expenses



☐ Get Last 5 EX Reports

☐ Add My Wallet Expense

☐ Send Reminder Notifications to EX Approvers

☐ Get EX Transaction Details

Requisition Inquiry



☐ Search by Item Description

☐ Search by Item ID

☐ Display Requisition Status Details

Supplier



☐ Invoice and Payment Status

☐ Collaboration skill (overdue POs, rejected receipts, etc.)

☐ Sourcing skill (bidder event details, award status)

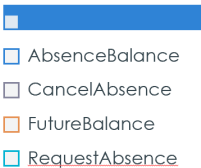
☐ Supplier Public skill (events, registration support, contacts)

System Requirements

- Oracle Digital Assistant (ODA) Cloud Subscription
- PeopleTools version is 8.57.07+
- PeopleSoft FSCM Update Image 9.2, PUM 033+
- PeopleSoft HCM Update Image 9.2, PUM 031+
- PeopleSoft Campus Solutions 9.2, PUM 015+
- PeopleSoft ELM Update Image 9.2, PUM 020+

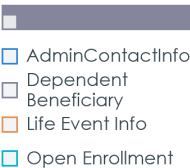
HCM Skills

Absence



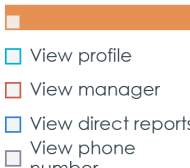
- ☐ AbsenceBalance
- ☐ CancelAbsence
- ☐ FutureBalance
- ☐ RequestAbsence

Benefits



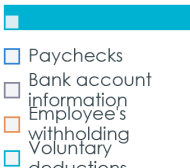
- ☐ AdminContactInfo
- ☐ Dependent Beneficiary
- ☐ Life Event Info
- ☐ Open Enrollment

Directory



- ☐ View profile
- ☐ View manager
- ☐ View direct reports
- ☐ View phone number

Payroll



- ☐ Paychecks
- ☐ Bank account information
- ☐ Employee's withholding
- ☐ Voluntary deductions

Candidate



- ☐ ApplicationStatus
- ☐ Submitting Applications
- ☐ SavedSearches
- ☐ SearchJobs

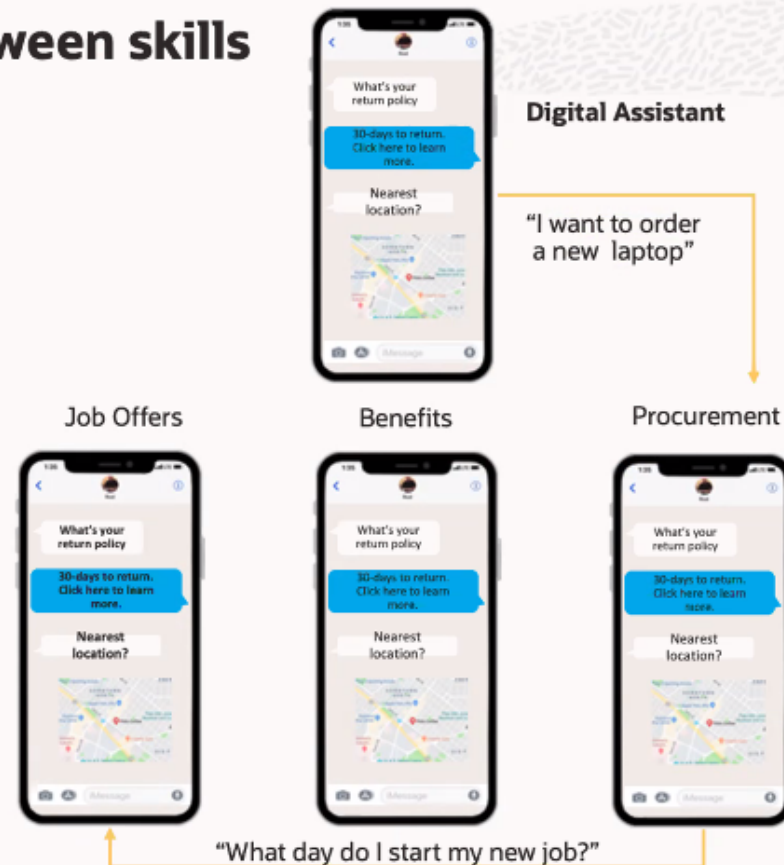
PICASO Chat Assistant

PeopleSoft Intelligent Chat Assistant from Oracle – Inquire, Transact, and more

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

Expense Skill

Hello Kenneth, I am PICASO, your PeopleSoft Employee Digital Assistant. Here are some things I can help you with.

Expenses Task Assistant

Create a "My Wallet" entry and inquire on expense reports.

Create a Wallet Entry

Show Pending Expense Reports

Show Expense Reports for Last Week

Requisition Skill

my LCD monitor

I found 10 requisition line(s) that match the term lcd monitor

Requisition US001/0000000226 (1 of 10)

Line: 1	Schedule: 1
Item:	A001 - 32 inch Desktop LCD Monitor, Widescreen
Quantity:	1 Each
Supplier:	Midton Computer Supplies

Supplier Skill

Friday, July 23, 2021, 02:52:39 PM ✓

I found 8 bidding opportunities that you can bid on.

Friday, July 23, 2021, 02:52:46 PM ✓

Sell - Fishing Rods
(1 of 8)

Event ID: 0000000183

Type: RFx

Starts: 07/22/2021 08:58 AM PST

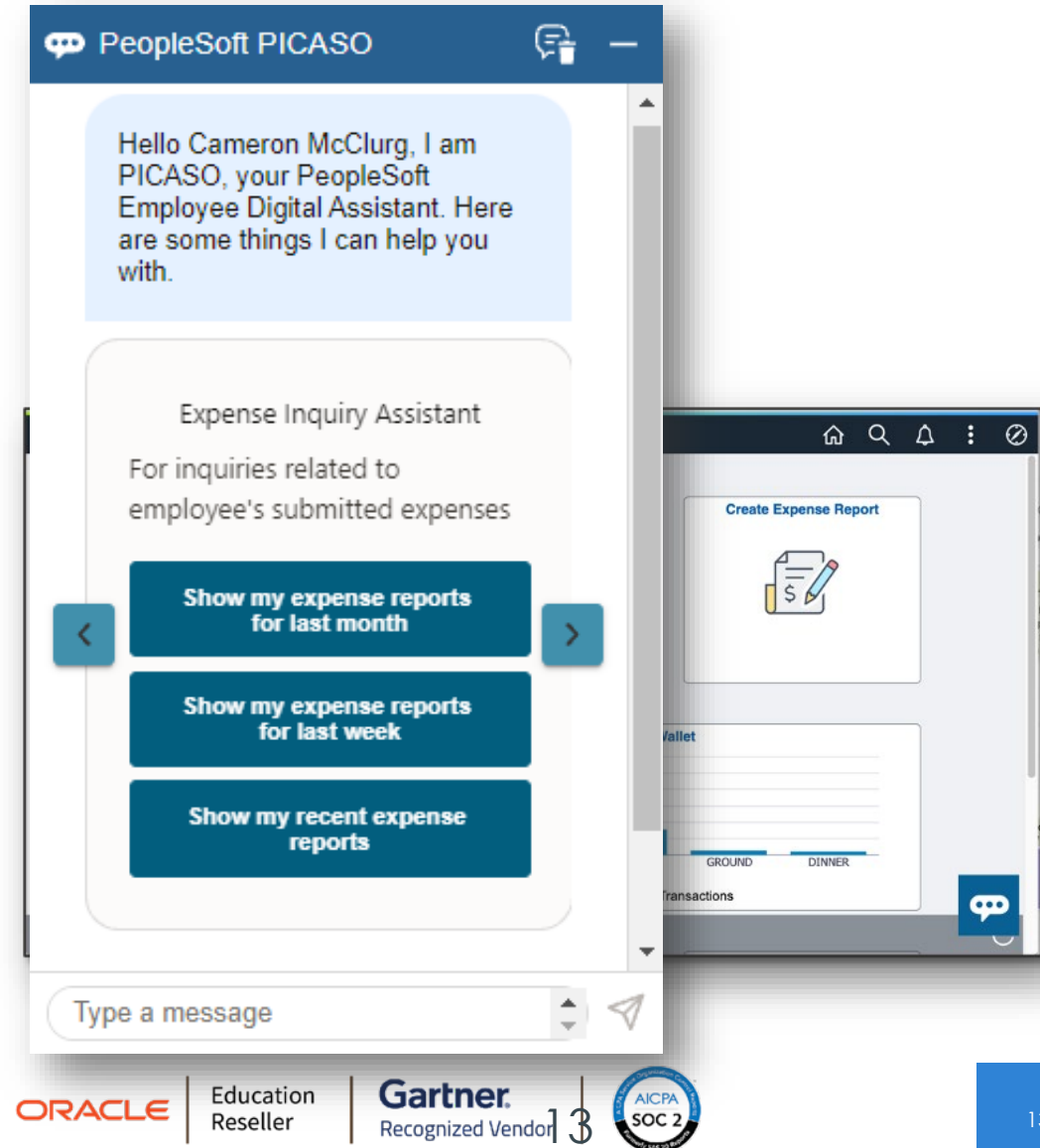
Ends: 12/31/2021 08:58 AM PST

For more details, select the following link

Take me there

Simulated Demo

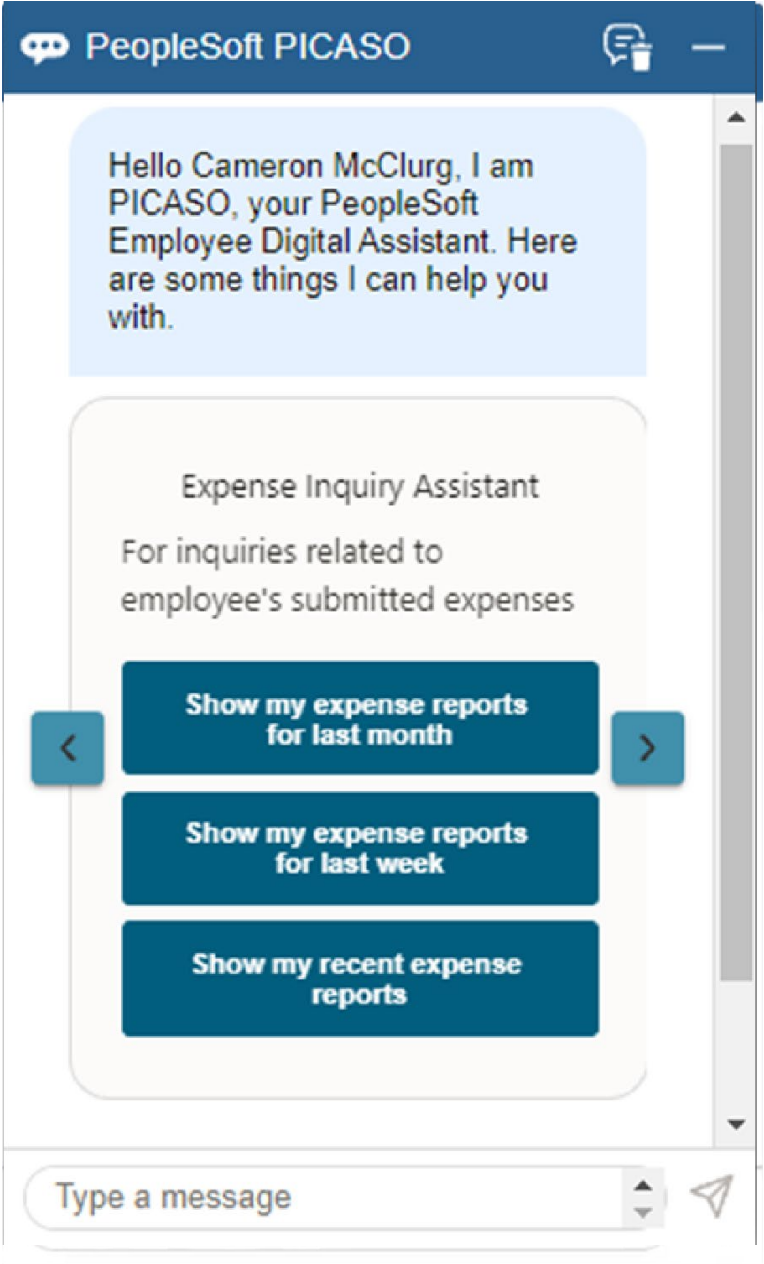
- PeopleSoft Digital Assistant (PICASO)

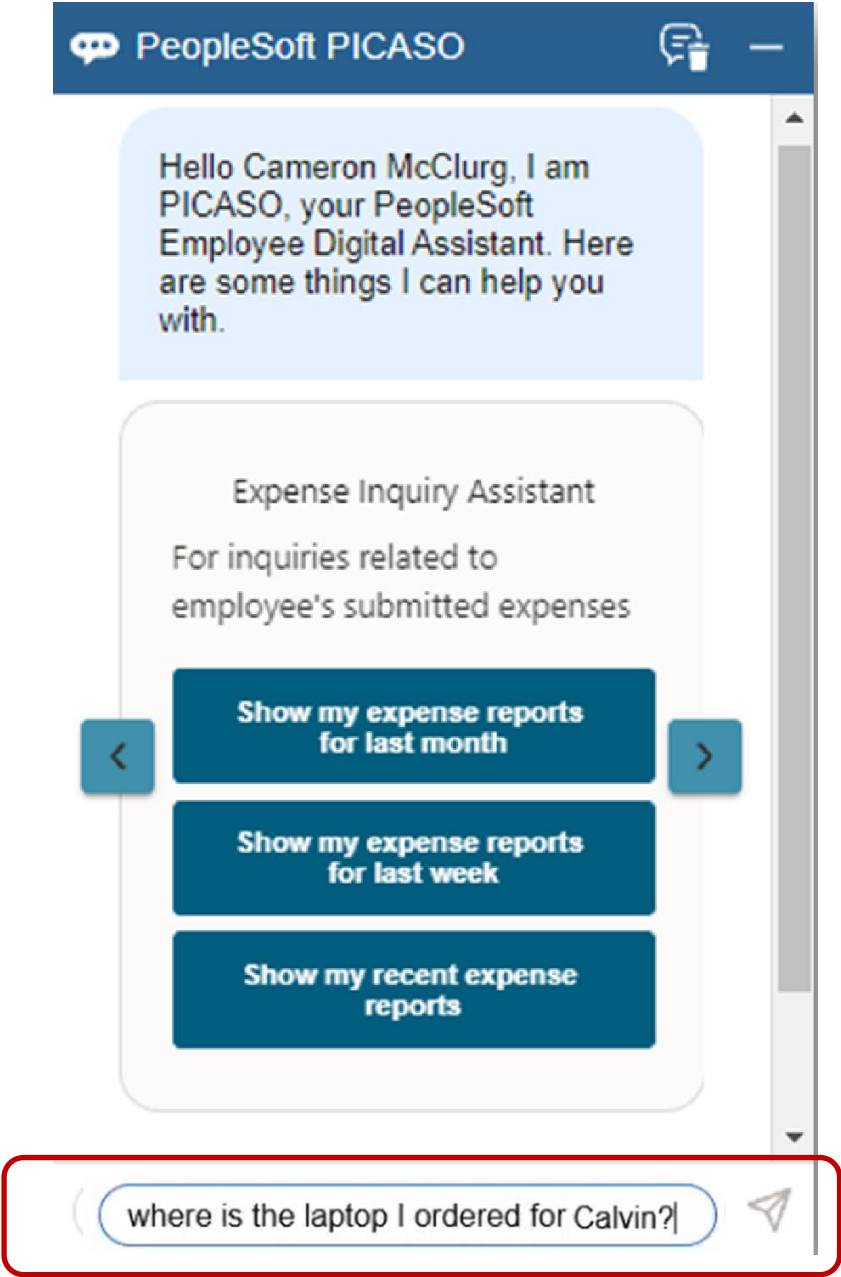


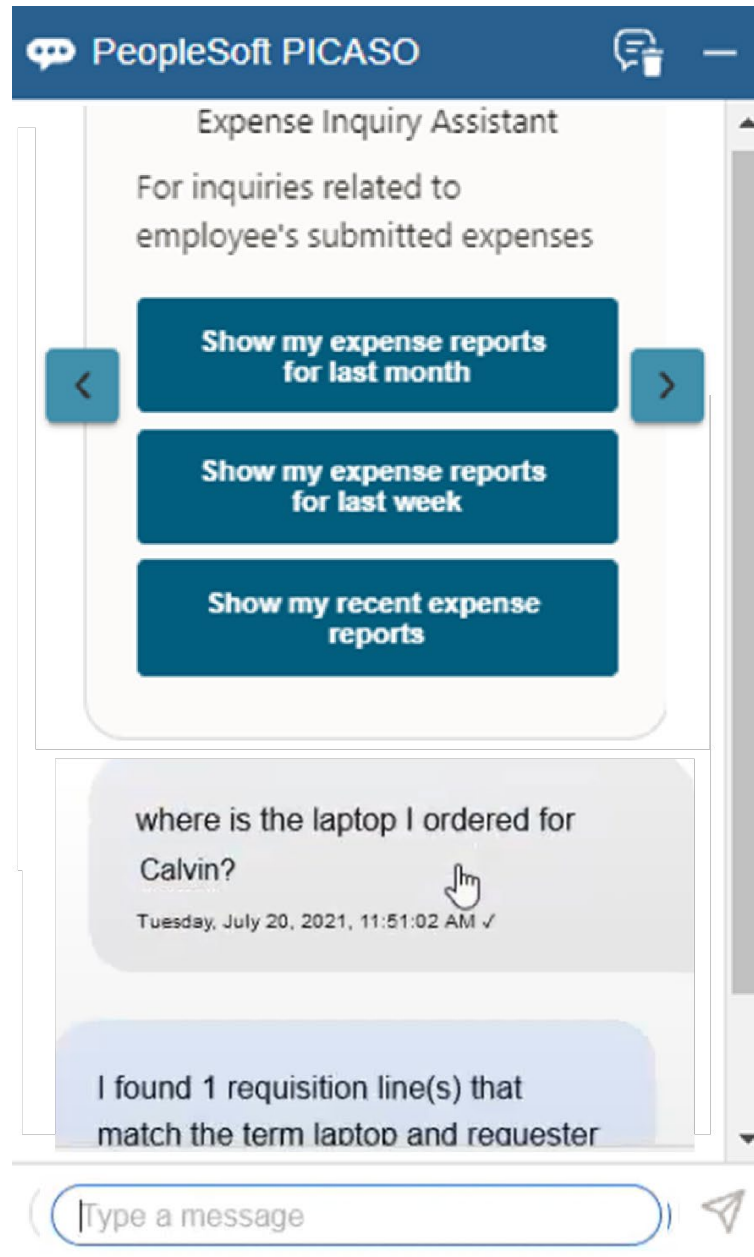


Approvals 28	eProcurement 	Expenses \$1,460.34 Unapplied Charges	Delegations
Benefit Details Action Required	Open Enrollment No Enrollment Available At This Time		Careers
Company Directory 	Time 	Payroll Last Pay Date 04/30/2021	Personal Details Action Required
My Profiles 	Performance 2 Current Documents	Total Rewards Total Rewards Statement 2020	









PeopleSoft PICASO

Requisition US003/0000000022

(1 of 1)

Line: 1

Schedule: 1

Item:

DSS_LAPTOP_MAC
- Appleby
McBrook Laptop

Quantity:

1 Each

Supplier:

Office Stop Inc

Request State:

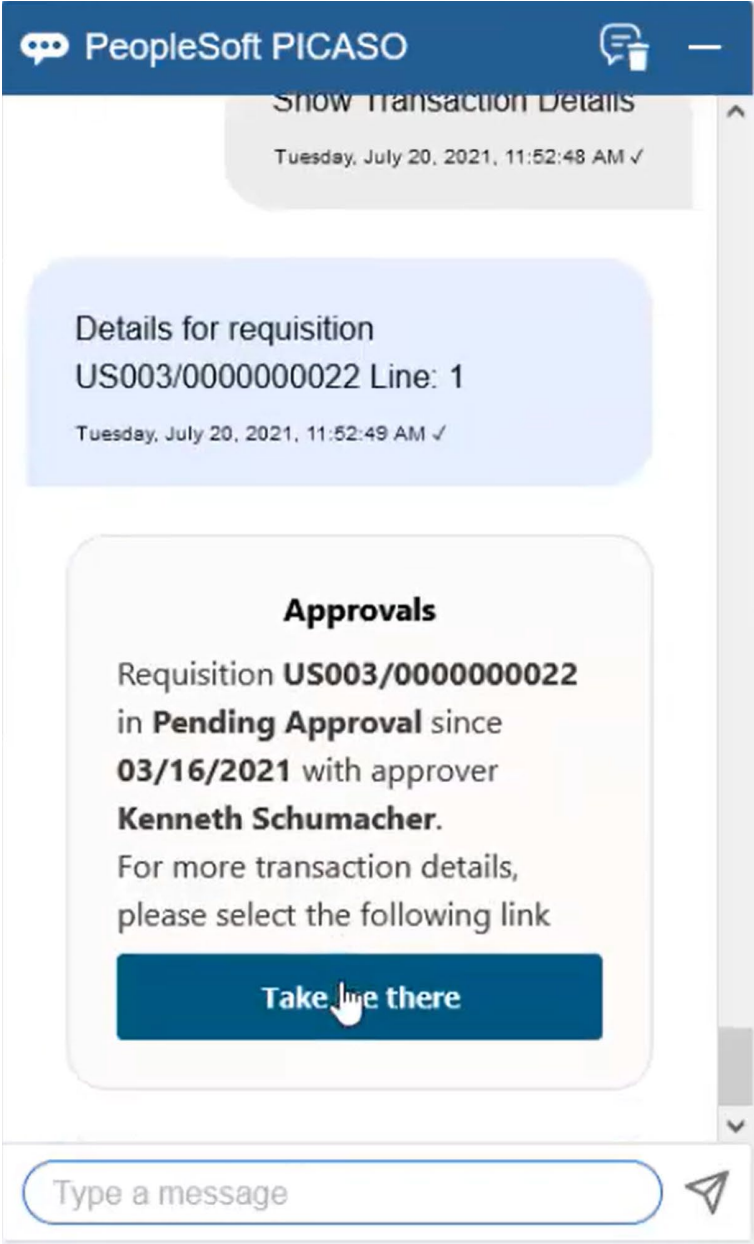
Pending Approval

Requester:

CROTH - Calvin
Roth

Show Transaction Details

Type a message



Requisition

Request for US003/0000000022
2,200.00 USD

 In Process - Kenneth Schumacher

Summary

Business Unit US003
Routed Date March 16, 2021
Requester Calvin Roth

Requisition ID 0000000022
Requisition Date March 16, 2021
Entered by Rosanna Channing
[Edit Requisition](#)

More Information

[View Printable Version](#)

Lines

Line Number	Item Description	Merchandise Amount
1	Appleby MacBook Laptop	2,200.00 USD

[Approval Chain](#)



Approval Chain

Fiscal Approval

▼ Requisition 0000000022

Pending

Start New Path

Route to Supervisors

✓ Approved

Betty Locherly
Supervisor by UserId
03/16/21 10:41 AM

>

⌚ Pending

Kenneth Schumacher
Inserted Approver

>

PeopleSoft PICASO

Requisition US003/0000000022

(1 of 1)

Line: 1

Schedule: 1

Item:

DSS_LAPTOP_MAC
- Appleby
McBrook Laptop

Quantity:

1 Each

Supplier:

Office Stop Inc

Request State:

Pending Approval

Requester:

CROTH - Calvin
Roth

Show Transaction Details

status of my expense report for AI training

Presentation Title
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Partner

Expertise in
PeopleSoft
in North America

Expertise in
Oracle Cloud Platform
in North America

Expertise in
Oracle EPM Cloud
in North America

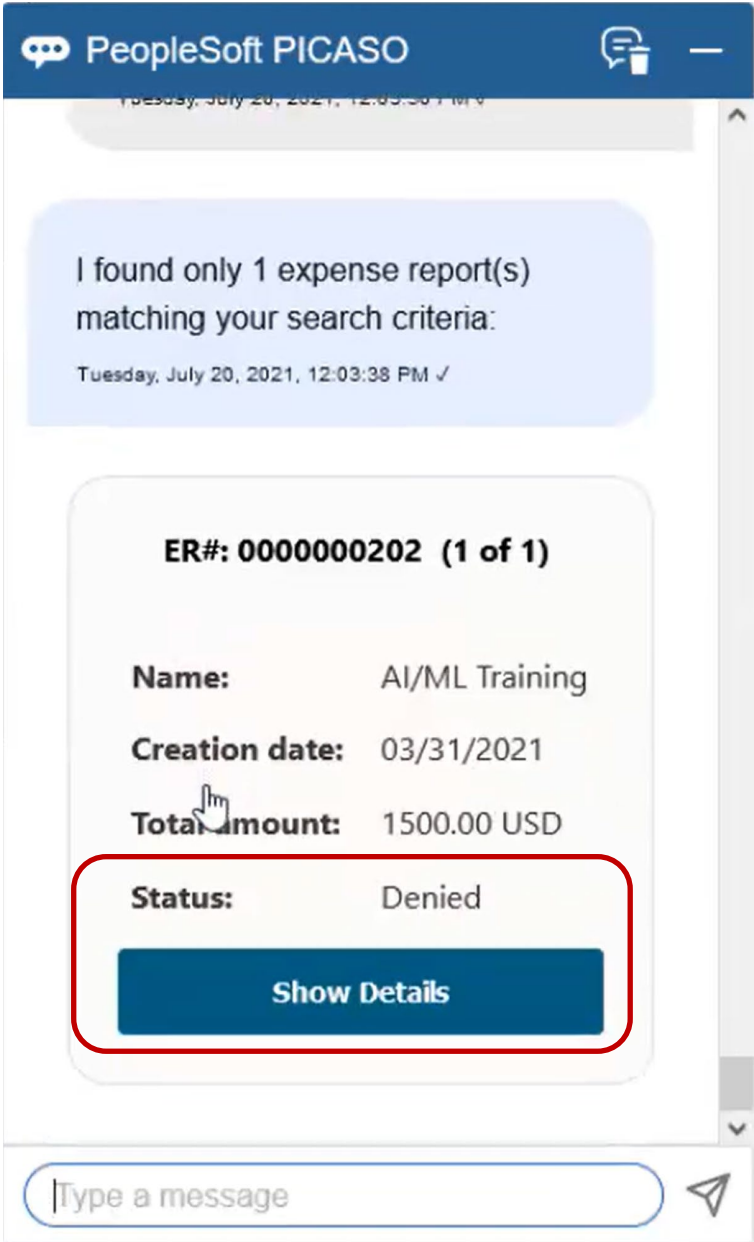
ORACLE

Education
Reseller

Gartner
Recognized Vendor

AICPA
SOC 2

22



PeopleSoft PICASO

Submitted on: 03/31/2021

Denied by: HR Supervisor - Betty Locherty on 03/31/2021

Comments: Not planned. Please justify why this needs to be done outside the US

Do you want to view the details of the DENIED line(s) ?

Yes

No

Tuesday, July 20, 2021, 12:04:12 PM ✓

Type a message

Presentation Title

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Partner

Expertise in
PeopleSoft
in North America

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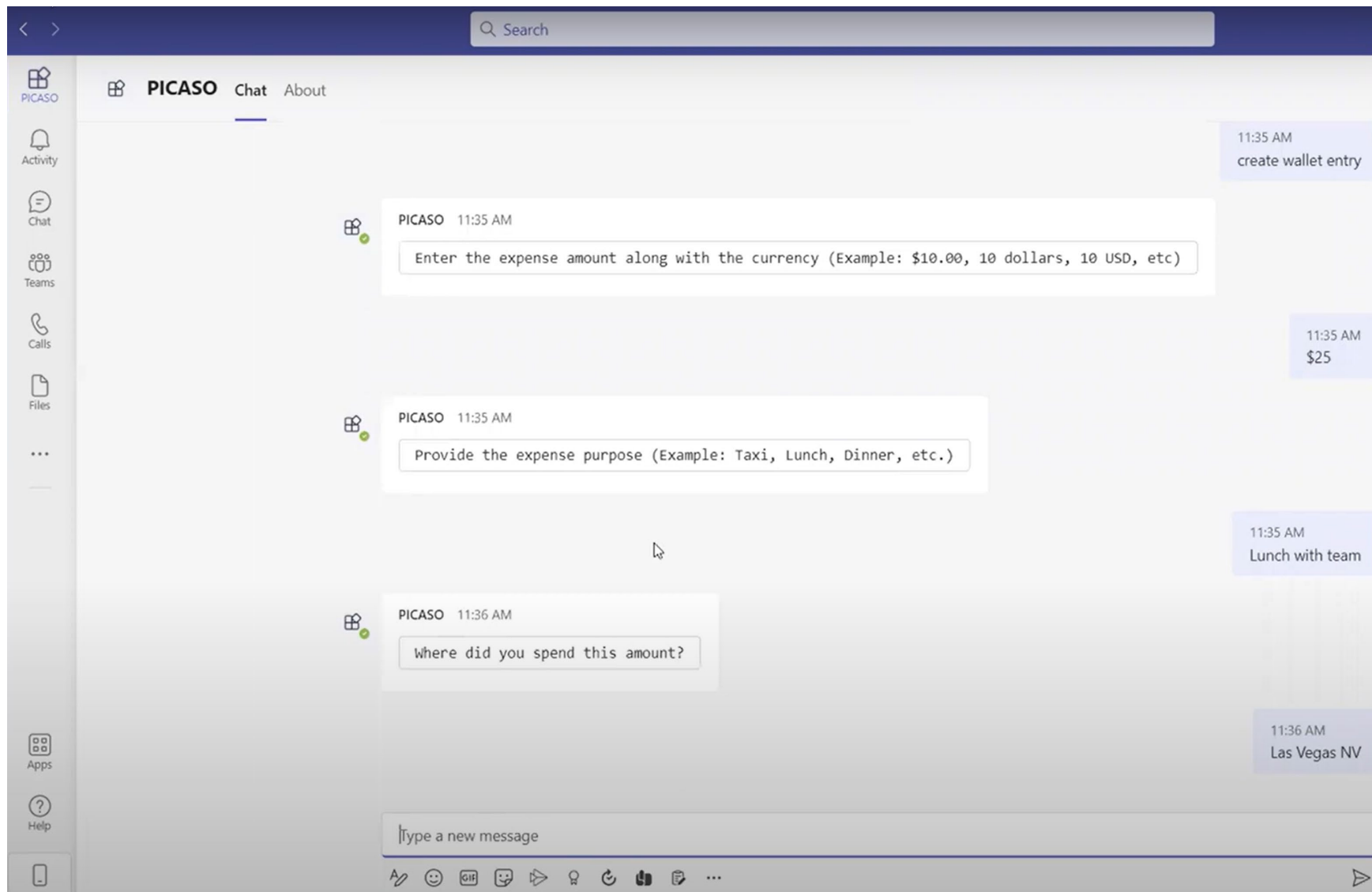
24

ODA Channels

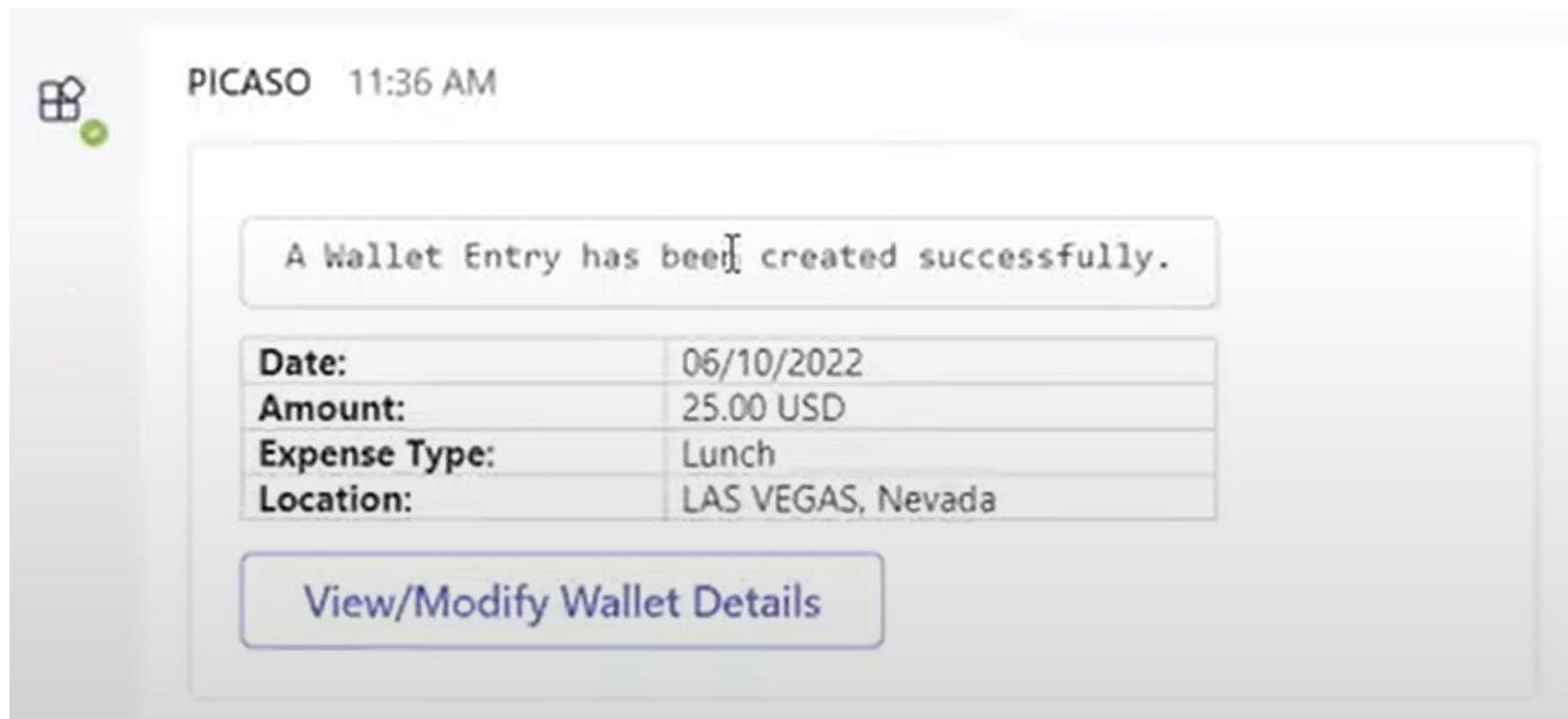
Pipeline through which ODA communicates with different chat clients

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

Microsoft Teams Channel Example

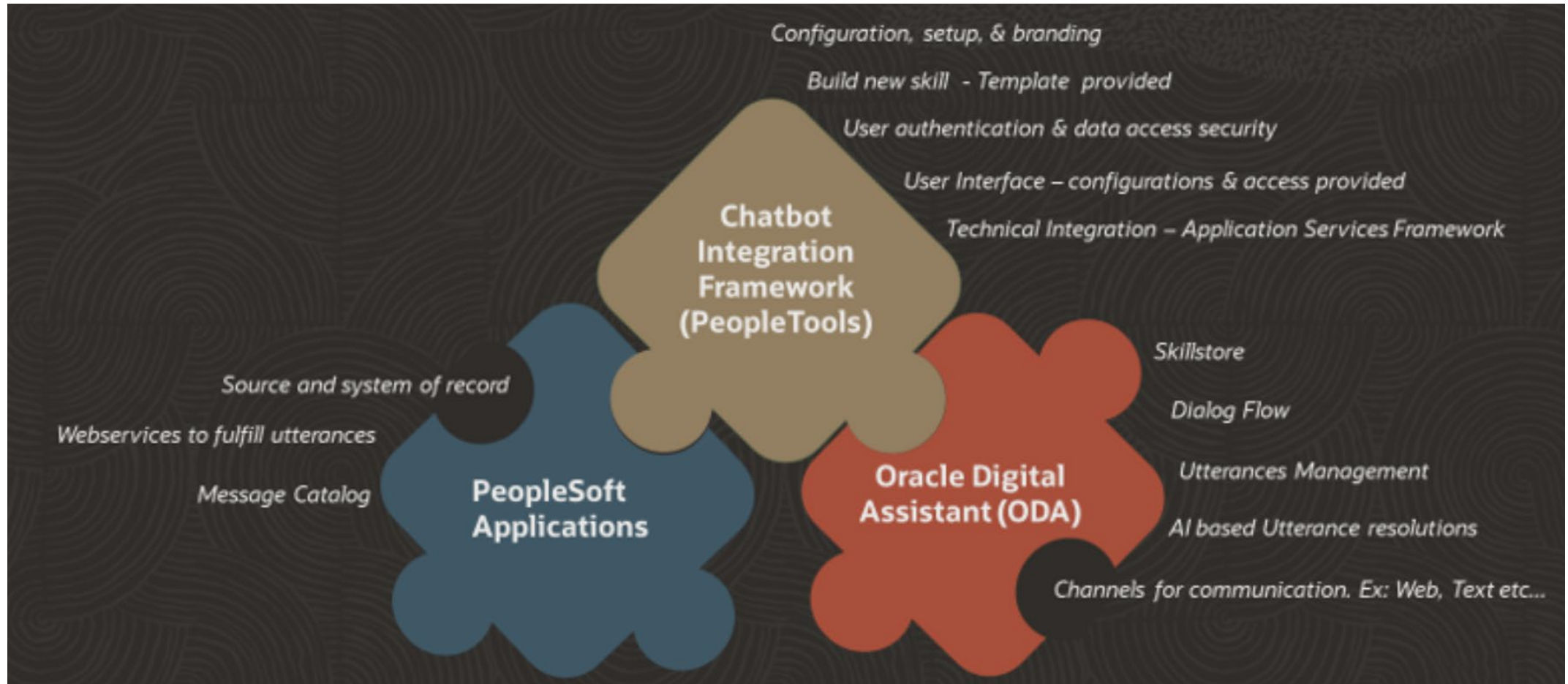


Microsoft Teams Channel Example



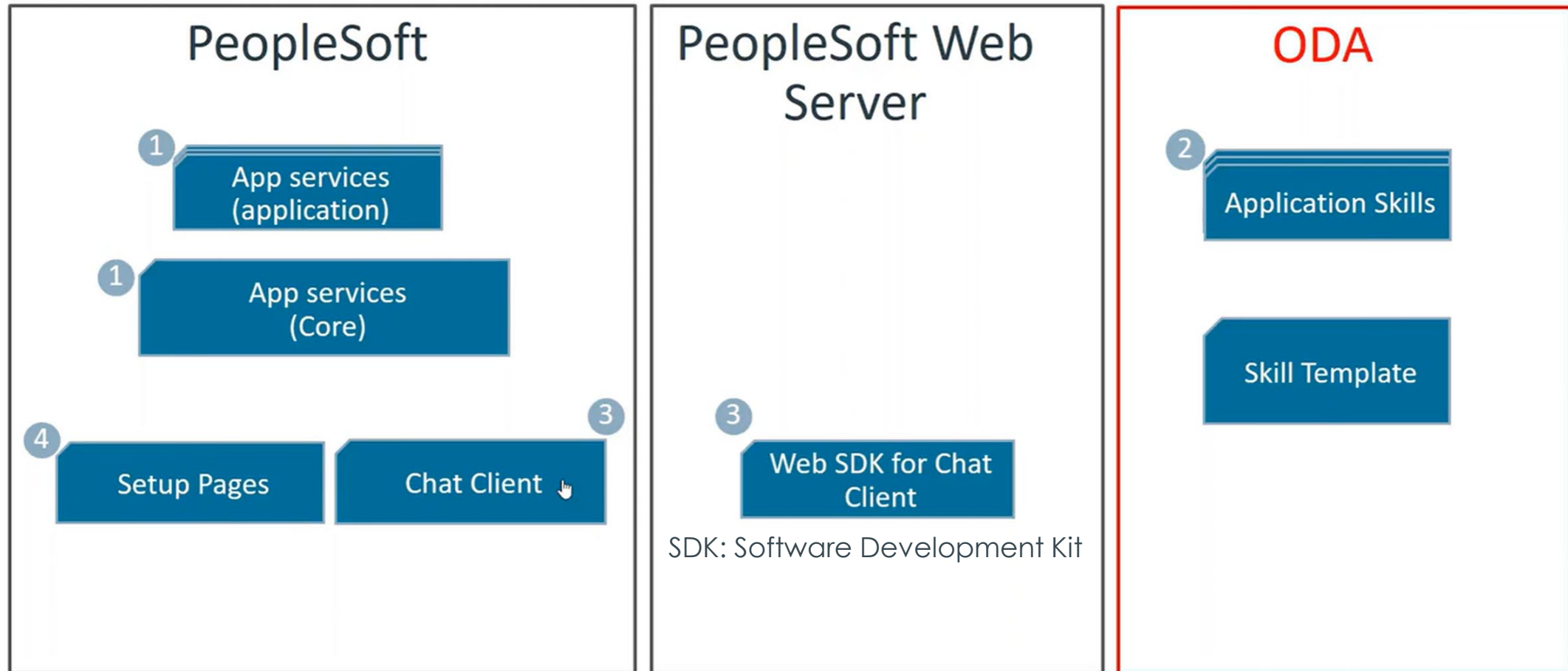
Chatbot Deployment Overview

Chatbot Integration Framework (CIF) - Delivered in Tools 8.57.07

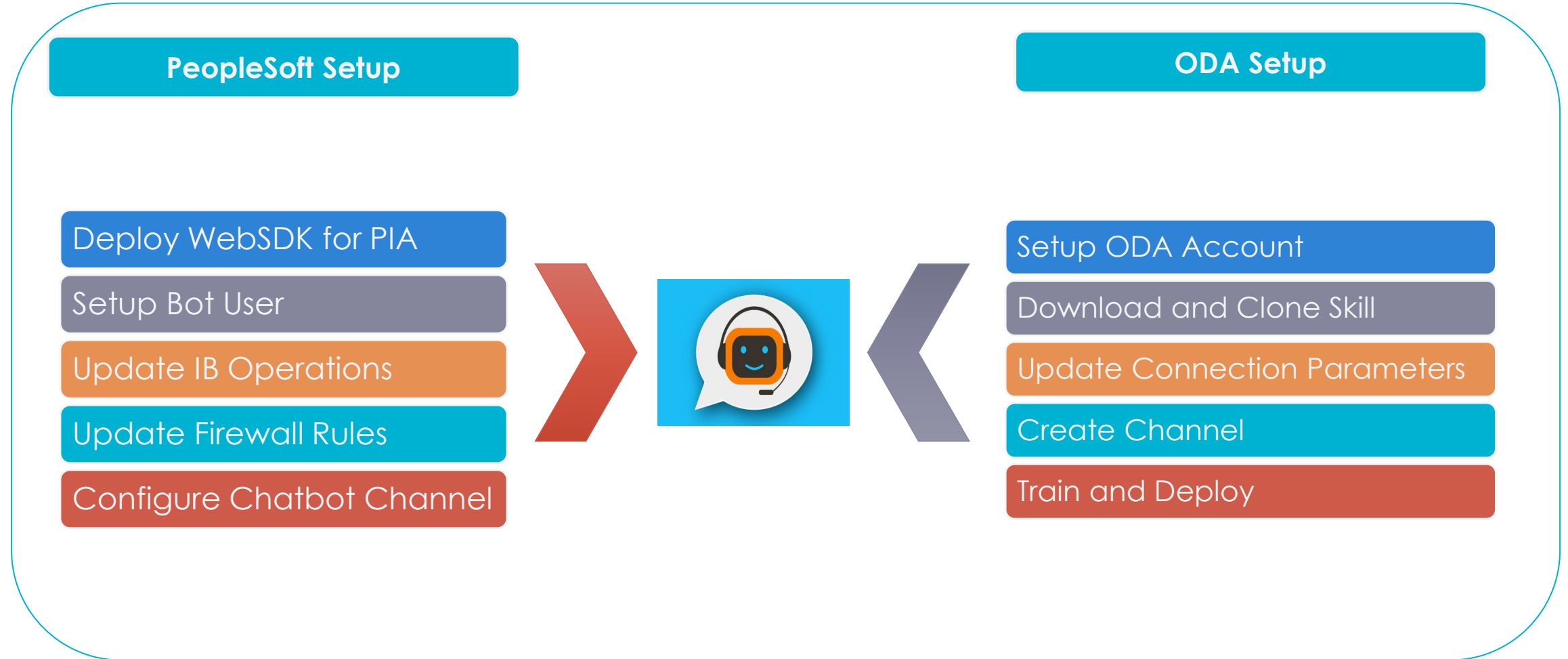


Chatbot Deployment Overview

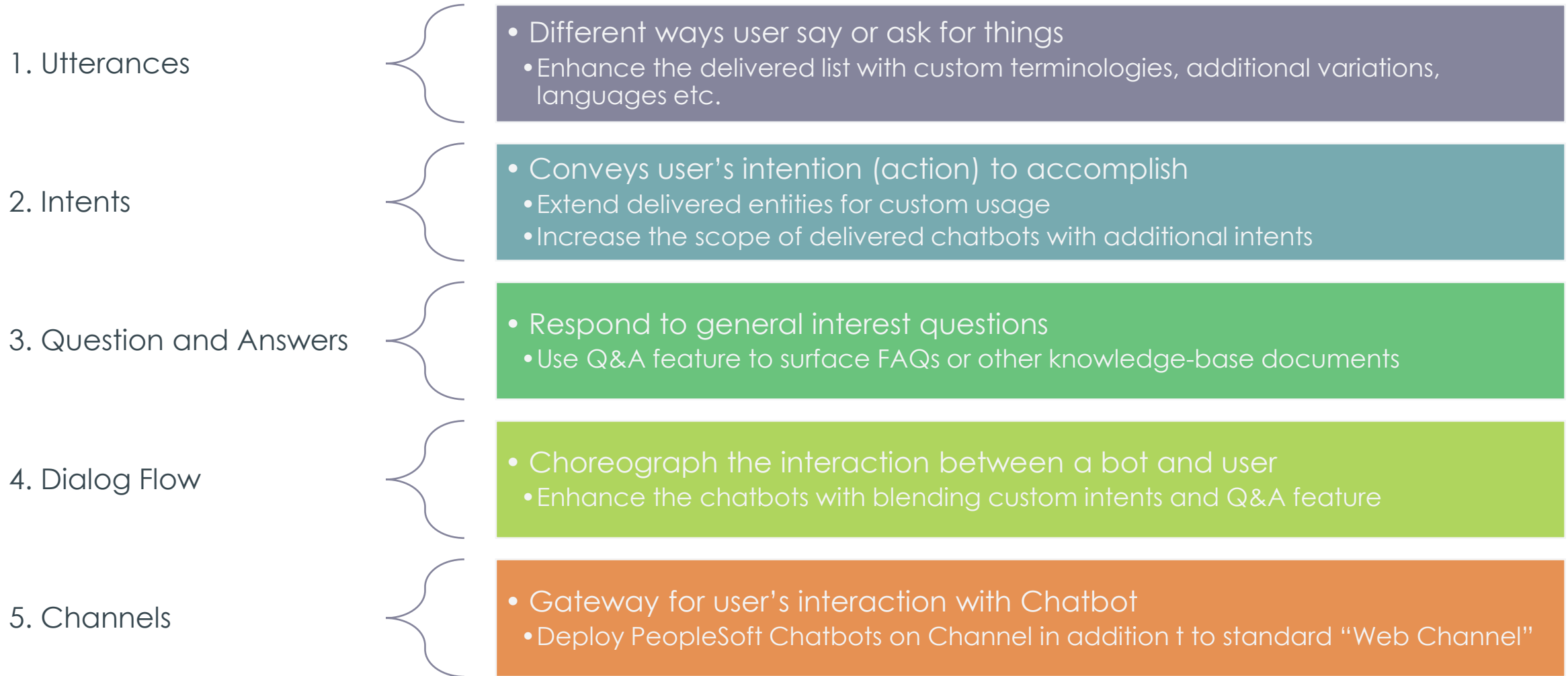
Delivered PeopleSoft and ODA Objects



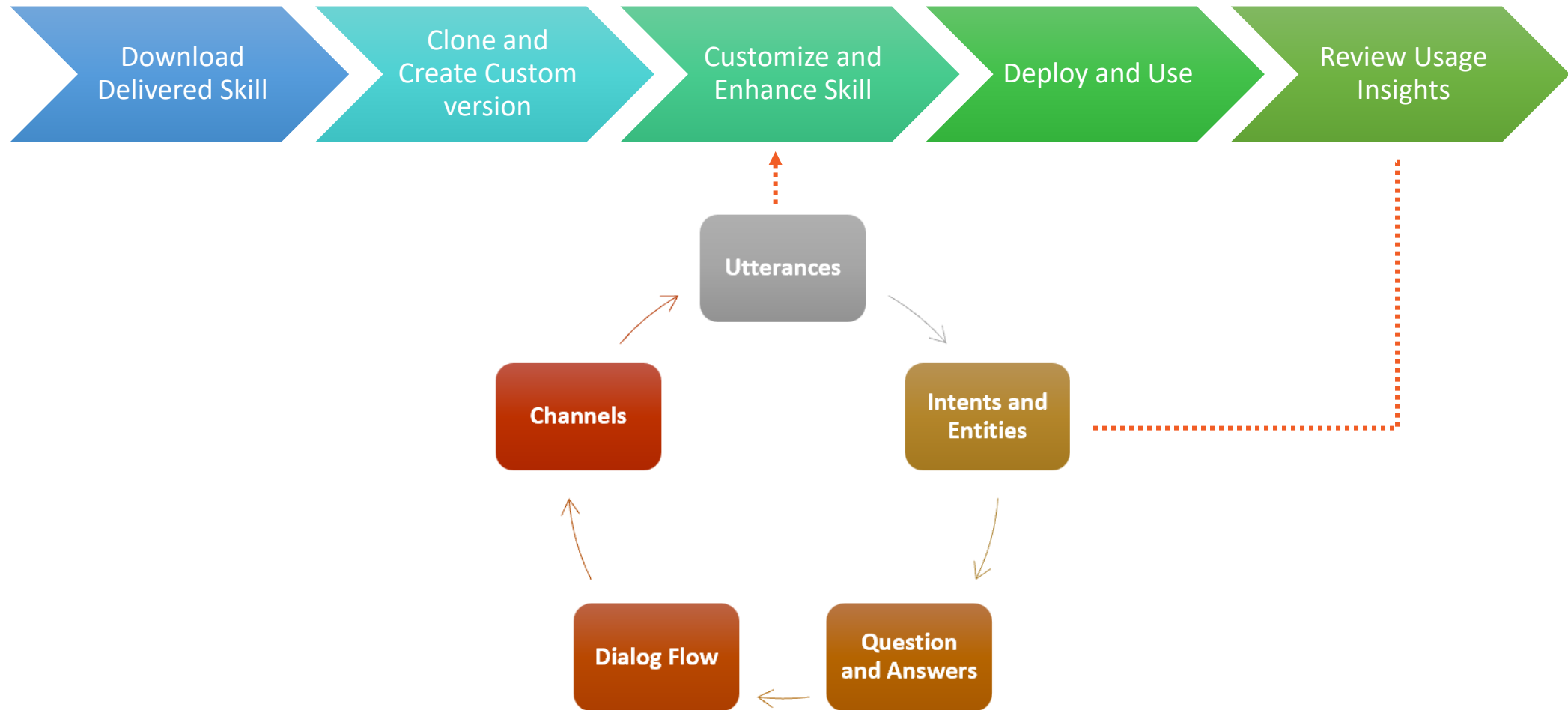
Deployment Process



Getting Chatbots Production Ready



Chatbot Deployment Lifecycle





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QUESTIONS