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 **SMART ERP**
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P-051843: From Data to Decisions: Making the Most of PeopleSoft HCM Insights

PeopleSoft
RECONNECT
DIVE DEEP - VIRTUAL!

PeopleSoft RECONNECT Dive Deep 2025

October 27 – 30, 2025

Meet SpearMC



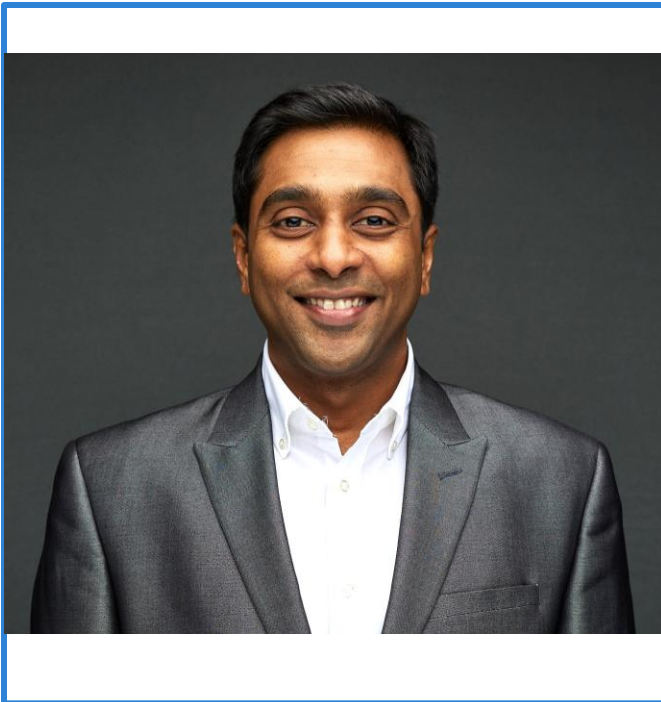
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Meet SpearMC



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**50/50 States
Supported**

Across multiple functional
disciplines



**15/15 Cabinet Agencies
Supported**

Supporting a wide range of
mission areas



**400+ Higher Education
Customers Supported**

Enabling our future leaders



**500+ Commercial Customers
Supported**

Supporting a wide range of
commercial areas



**500+ Cloud
(SaaS and OCI)
Projects**

Modernizing Oracle
Workloads



**100,000+ Oracle
Transactions**

Experience Matters



**1,500+ Oracle
Implementations**

Application Specialists



**1,650 Oracle Cloud
Certifications**

Highly Capable
Technologists

Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



Managed Services

PeopleSoft
Administration

PeopleSoft
Functional Support

PeopleSoft Infrastructure

PeopleSoft Development



PeopleSoft Expertise

Financials and
Supply Chain

Human Capital
Management

Campus Solutions

Enterprise Performance
Management



PeopleSoft Training

All-Access Learning Pass

Live Private Training

Oracle Guided Learning

Public Training Classes



PeopleSoft Products

Segregation of Duties

Grants Labor
Cost Distribution

OGI Starter Kit

PTF Testing Grounds



Oracle Cloud

PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud
Infrastructure

Cloud Learning
Subscriptions

ORACLE CONTRACT VEHICLES

Oracle Public Sector Addendum | Texas DIR | University of Texas System | E&I for Higher Education | CSU / Univ of CA / CCC | State of New York

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- **FSCM:** Fluid Approvals & Delegations, Expenses, Procurement & Supplier Contract Management
- **HCM:** Core HR, Payroll, Benefits
- **Campus Solutions:** Advisement, Admissions, Registration, 3C's



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Agenda

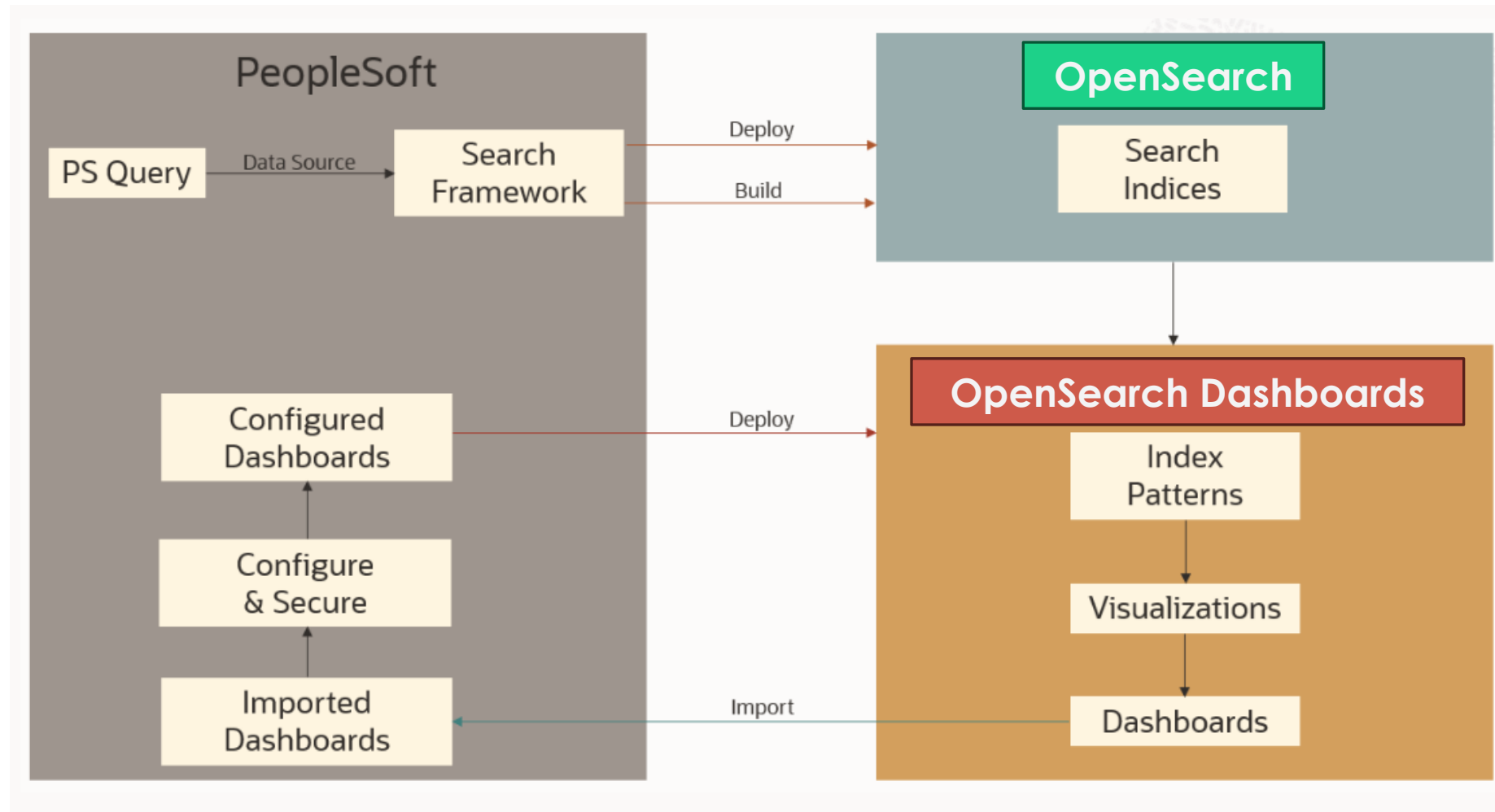
- OpenSearch Dashboards – Overview
- Delivered PeopleSoft HCM Dashboards
- Insights Catalog Feature
- HCM Dashboards - Demo

OpenSearch Dashboards

- Beginning with PeopleTools 8.60.07, PeopleSoft uses OpenSearch Dashboards, an open-source analytics and visualizations platform
- OpenSearch Framework and Dashboards replaces Elastic Search and Kibana Dashboards
- Customers using Elastic and Kibana can easily transition OpenSearch software using the PeopleSoft Search Framework

PeopleTools Version	Visualization Software
PeopleTools 8.57 – 8.59	Kibana
PeopleTools 8.60	Kibana & OpenSearch
PeopleTools 8.61+	OpenSearch

PeopleSoft - OpenSearch Interaction



OpenSearch – Dashboard Deployment

- Insight Dashboards come pre-configured as part of HCM PUM Images and requires minimal effort to deploy
- Dashboards can be selectively adopted from PUM images based on the modules used and deployment needs
- Security Permission Lists and Roles can be easily integrated into customer definitions to enable dashboards to end users

Dashboard Deployment Tasks	Delivered via PUM	Customer Action
1. Data Source		
1.1. Create PS Query or Connected Query	✓	
1.1.a. Define Drilling URL for Navigation	✓	
1.1.b. Create date/time prompt for incremental indexing	✓	
2. Search Designer		
2.1. Create Search Definition	✓	
2.1.a. Use Query (data source) created for search	✓	
2.1.b. Map query fields to search metadata attributes	✓	
2.1.c. Add security-related metadata	✓	
2.2. Create Search Category	✓	
3. Search Administration		
3.1. Deploy Search Definition/Category		✓
3.2. Build Search Index		✓
4. Create Visualizations/Dashboards		
4.1. Create Index Pattern	✓	
4.2. Create Visualizations	✓	
4.3. Create Dashboards	✓	
5. Administer Visualizations/Dashboards		
5.1. Import Dashboards	✓	
5.2. Configure Dashboards	✓	
5.3. Specify User Privileges		✓
5.4. Deploy Dashboards		✓

HCM Dashboards

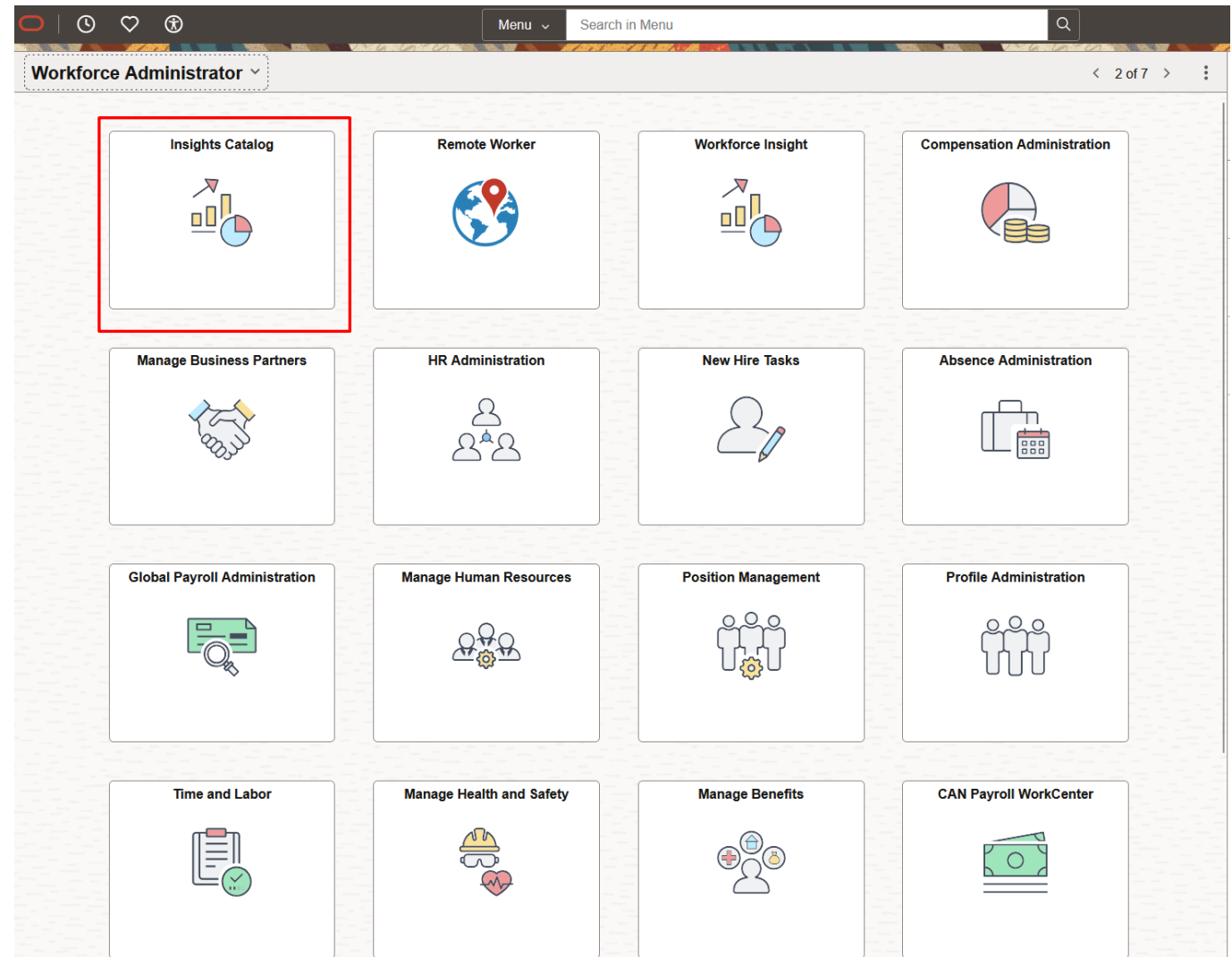
Delivered HCM Dashboards

HCM Dashboards	Delivered in Image
Approval Insights	Image 51
Onboarding Insights - For HR Administrators - For Managers	Image 49
Remote Worker Insights	Images 40, 44, 45
Position Management Insights	Image 48
Performance Management Insights - Document Insights - Performance Rating Insight	Image 46

HCM Dashboards	Delivered in Image
Core HR - Workforce Composition - Workforce Equity	Image 34
Benefits - Ben Admin Processing Insights - Benefits Utilization - Life Events Insights - Open Enrollment Insights	Images 39 - 46
Health and Safety - Incident Analytics - Vaccination Analytics - Test Analytics	Image 37 - 44
Payroll - Payroll Cost Analytics - Payroll Operations Analytics - Payroll Trends Analytics	Image 39 - 43
Recruiting Solutions - Application Details - Recruiter Pipeline - Recruitment Admin	Image 34 - 41
Time and Attendance - Absence Event Insights - Processed Absence Insights - Payable Time & Reported Time Insight	Image 38 - 42

Insights Catalog

- Insights Catalog is a Navigation Collection that gives direct access to a collection of HCM Insights dashboards.
- Security Roles controls the visibility of the tile and visibility of individual dashboards within the navigation collection to different user groups



← | ⌚ | ♥

Q Search in Menu

🏠 | 🔔 | ⋮ | 🔄

Insights Catalog

🌐 Approvals ▾

📅 Absence Management ▾

👤 **Benefits** ▴

Ben Admin Processing Insights

Benefits Utilization

Life Events Insights

Open Enrollment Insights

🌐 Global Payroll ▾

🏢 Health and Safety ▾

👤 OnBoarding ▾

📄 Payroll for North America ▾

📈 Performance ▾

👥 Position Management ▾

📄 Recruiting ▾

👤 Remote Worker ▾

👤 Time and Labor ▾

👤 Workforce ▾

Open In OpenSearch Dashboards

Search

DQL

📅 ▾ Last 5 years

Show dates

🔄 Refresh

+ Add filter

Benefits - Controls

Business Unit

Department

Benefit Program

Plan Category

Select... ▾

Select... ▾

Select... ▾

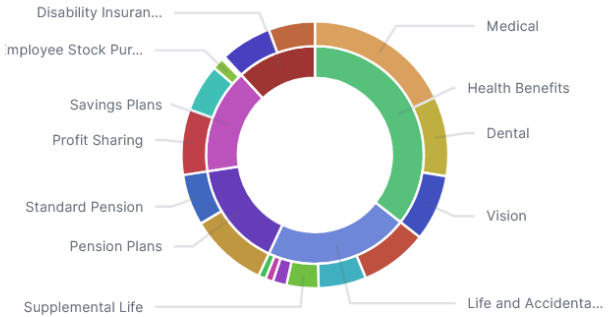
Select... ▾

Apply changes

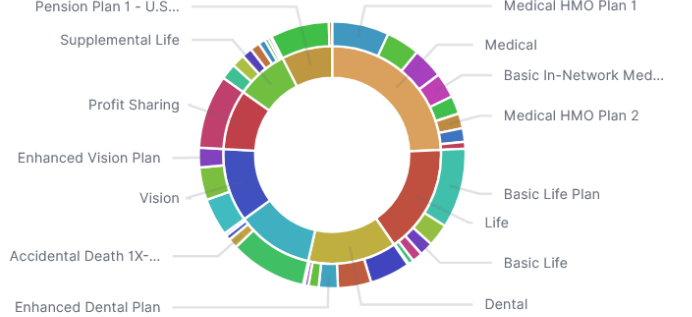
Cancel changes

Clear form

Employees by Plan Category



Employees by Plan Type



Enrolled vs Waived

Dependents Covered

HCM Dashboards Demo

References

- [PeopleSoft Insights - Info Page](#)
- [HCM Delivered Insight Dashboards](#)
- [Blogs about PeopleSoft Insights](#)
- [MOS - PeopleSoft Search and Insights Homepage](#)



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Quest
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Appendix

Date	Time (ET)	Session Title	Presenters	Session #
October 28	1:45 PM	Training, Policy Management and Change Management Made Easy with Oracle Guided Learning	Cameron McClurg	P-051593
October 29	11:15 AM	Fluid Performance Management: Tips, Tricks & Best Practices	Logesh Balasubramaniam	P-051596
October 29	12:30 PM	From Data to Decisions: Making the Most of PeopleSoft HCM Insights	Gary Dranikoski Logesh Balasubramaniam	P-051843
October 29	1:45 PM	AI-Powered Cloud: What's New in Oracle OCI and PeopleSoft	Joe Finlinson Cameron McClurg	P-051594
October 29	1:45 PM	Optimize Student and Employee Journeys with the power of Activity Guides	Logesh Balasubramaniam	P-051597
October 30	1:45 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randall Johnson Gary Dranikoski	P-051437
October 30	1:45 PM	PeopleSoft vs. Oracle Fusion Cloud: A Side-by-Side Look at Grants Management	Jessica Mann	P-051824

November 2025 Class Schedule

Date	Session
Nov 3	<u>PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions</u>
Nov 4	<u>PeopleSoft 9.2 Query Advanced for Campus Solutions</u>

January 2026 Class Schedule

Date	Session
Jan 7	<u>PeopleSoft 9.2 Query Basic & Intermediate for FSCM</u>
Jan 8	<u>PeopleSoft 9.2 Query Advanced for FSCM</u>
Jan 13-15	<u>PeopleTools I & II Accelerated</u>
Jan 20-21	<u>PeopleCode I & II Accelerated</u>
Jan 28-29	<u>PeopleSoft Insights with OpenSearch Technologies</u>

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February 2026 Class Schedule

Date	Session
Feb 2-3	<u>PeopleTools – Application Engine</u>
Feb 9	<u>PeopleSoft 9.2 Query Basic & Intermediate for HCM</u>
Feb 10	<u>PeopleSoft 9.2 Query Advanced for HCM</u>
Feb 10	<u>HCM Bootcamp – Core HR</u>
Feb 11	<u>HCM Bootcamp – NA Payroll</u>
Feb 12	<u>HCM Bootcamp – Benefits Administration</u>
Feb 12-13	<u>Oracle SQL & SQR for PeopleSoft</u>
Feb 17	<u>PeopleSoft Maintenance Tools & Strategies</u>
Feb 18-19	<u>PeopleTools Integration Broker Configure & Administer</u>

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March 2026 Class Schedule

Date	Session
Mar 3	PeopleTools – Activity Guides
Mar 5	PeopleTools Security (Functional) for FSCM & HCM
Mar 9-10	PeopleTools Security (Technical)
Mar 11-12	PeopleTools – Fluid UI Development
Mar 17-20	PeopleTools System Administration: Maintenance and Troubleshooting

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