SpearMC

PeopleSoft Kibana Customer Success

Presentation to Oracle All Hands Call

July 2022

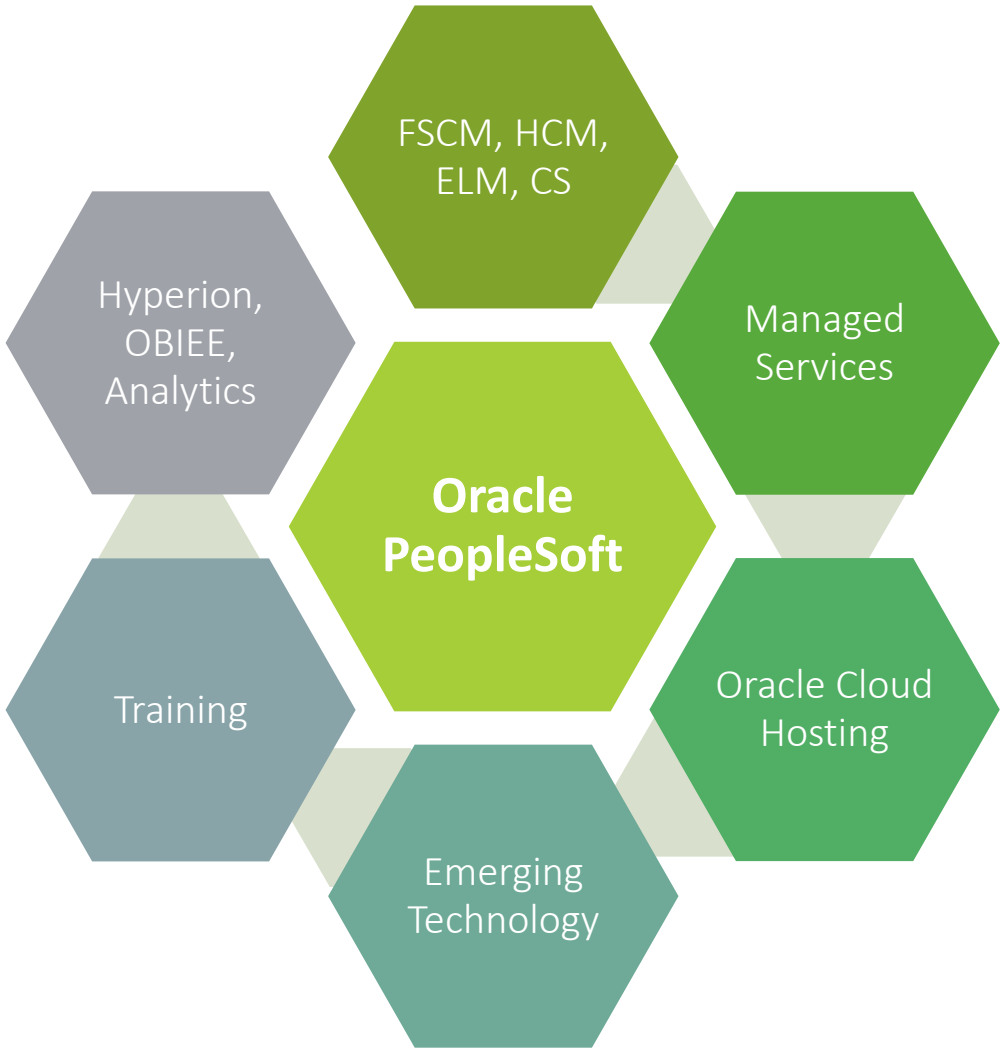
ORACLE Partner
Expertise in PeopleSoft in North America
Expertise in Oracle Cloud Platform in North America
Expertise in Oracle EPM Cloud in North America
ORACLE Education Reseller
Gartner Recognized Vendor

About Me & SpearMC

GARY DRANIKOSKI

Director, Managed Services & Analytics

gary.dranikoski@spearmc.com
(724) 448-1614



20+ years of PeopleSoft, Reporting & Analytics

PeopleSoft Consultant
- Implementations/Upgrades
- Production Support
- Reporting and Analytics

Former Consultant & Developer at PeopleSoft/Oracle
- Rapid Apps
- Upgrades

Reporting & Analytics Specialties
- Oracle Business Intelligence including BI Apps, OTBI & OAC
- Kibana

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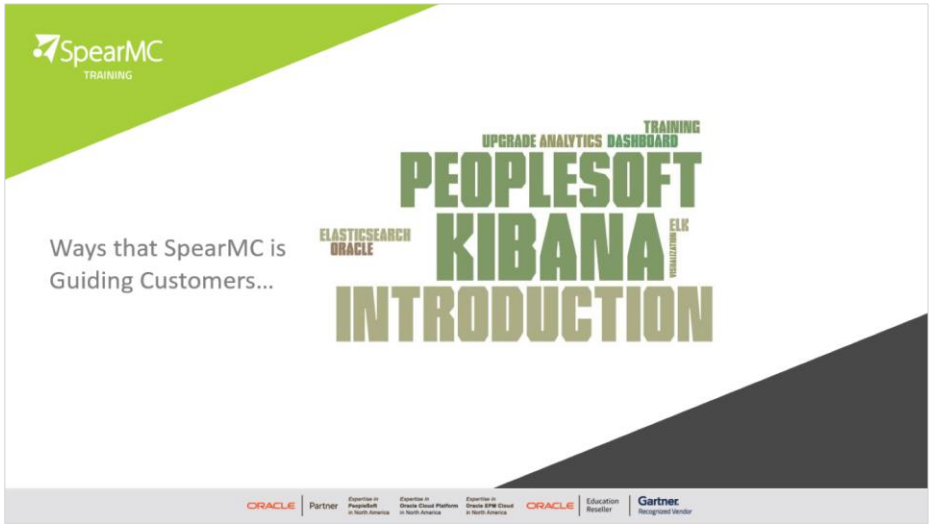
Overview


SpearMC
TRAINING
Ways that SpearMC is Guiding Customers...
UPGRADE ANALYTICS DASHBOARD TRAINING
PEOPLESOFT
ELASTICSEARCH ORACLE KIBANA ELK
INTRODUCTION

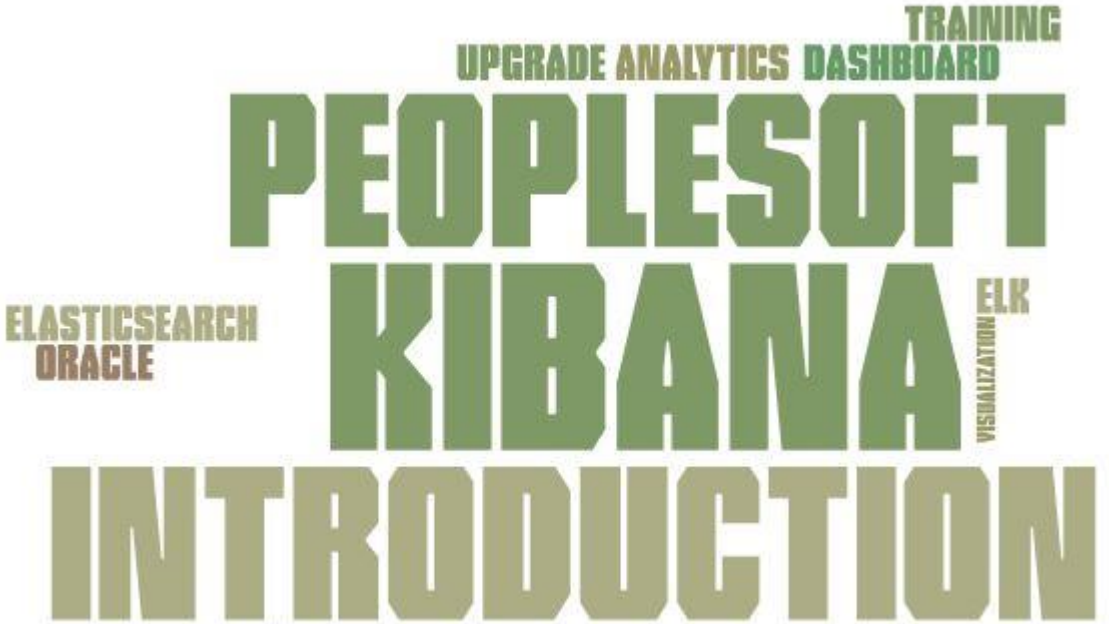
SpearMC
TRAINING
Where is the Value for Customers...
PEOPLETOOLS
ELK ORACLE KIBANA ELASTICSEARCH SEARCH TRAINING
ANALYTICS
FRAMEWORK
DASHBOARD PEOPLESOFT
VISUALIZATION UPGRADE

SpearMC
TRAINING
Improving the Customer Experience
PREBUILT VISUALIZATION CONTENT ORACLE ELASTICSEARCH REGIONMAP PREBUILT UPGRADE TRAINING
TIPS&TRICKS
DEMO
HCM DASHBOARD KIBANA FSCM METRIC SPEARMC PEOPLESOFT
ANALYTICS GUAGE EIGHTFIVEEIGHT

SpearMC
TRAINING
Questions or Comments...
SPEARMC PEOPLESOFT
EIGHTFIVEEIGHT ELASTICSEARCH
PEOPLETOOLS ORACLE ANALYTICS KIBANA
VISUALIZATION Q&A UPGRADE
TRAINING DASHBOARD

SpearMC
TRAINING

Ways that SpearMC is Guiding Customers…



Highlighting the Reporting Options Delivered with PeopleSoft

Ways that SpearMC is Guiding Customers…

	Query	SQR	nVision	BI Publisher	Pivot Grids	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

History in the Making

Ways that SpearMC is Guiding Customers…

Elasticsearch introduced as a search option for the PeopleSoft stack

Elasticsearch replaces SES

Kibana Visualizations & Dashboards available to System Administrators for performance metrics

Kibana Visualization capabilities available with PeopleSoft Application Data , Health Center Dashboard (Logstash), PUM->Delivered Dashboards and pre-built content for Application Data

Real-Time Indexing and External Data Integration

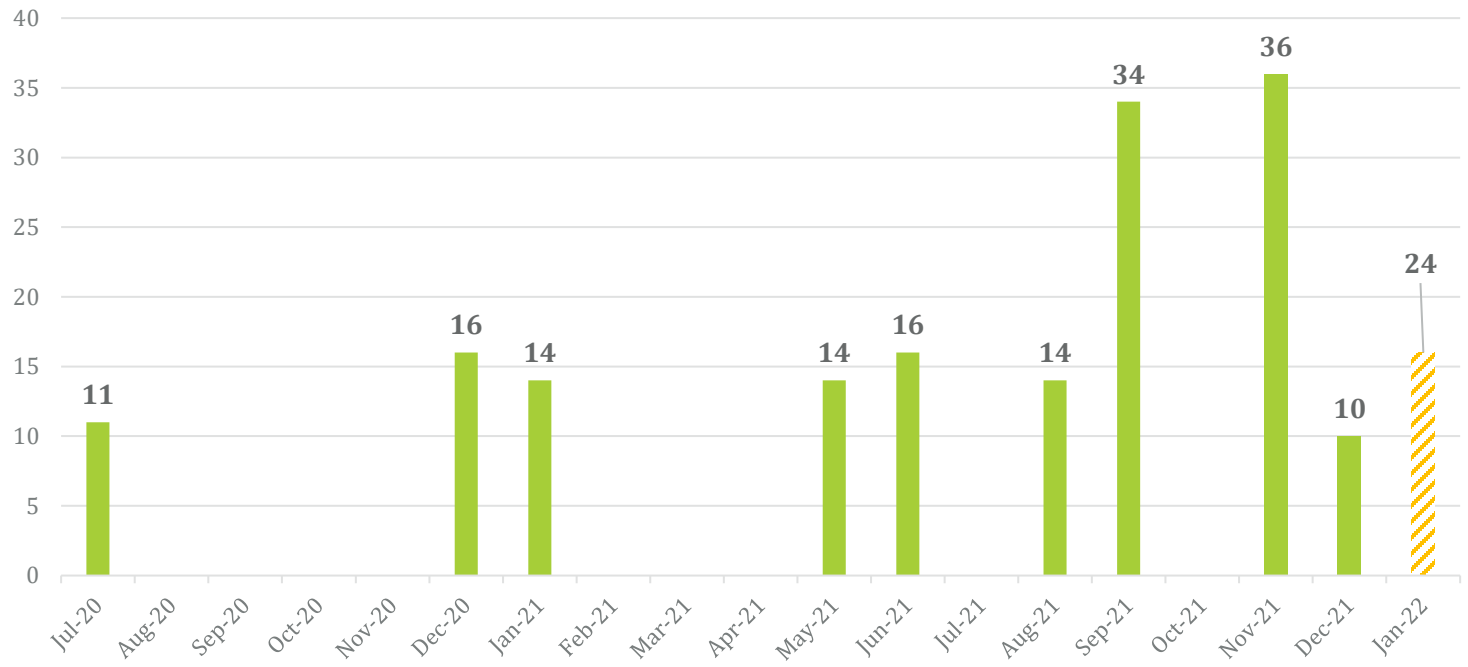
Kibana Training

Ways that SpearMC is Guiding Customers…

181+
SpearMC LVT Students

4,000+
Conference, Webinar or YouTube Views

SpearMC Kibana Training Student Count



PeopleSoft Data

- Delivered Elasticsearch Indexes
- Preparing data for Kibana

Kibana

- Overview, Architecture & Installation
- Creating new Search Index
  - Scripted Fields
- Create Dashboards and Visualizations

Elasticsearch

- Elasticsearch Overview and Installation
- Search Administration
  - Search Instance
  - Search Definition Deployment

PeopleSoft Dashboards

- Importing Kibana Dashboards
- Configuring Kibana Dashboards
- Related Content Tiles
- Security

Use Cases

- HCM, FSCM, Campus Solutions
- System Administration

Enabling Customer Success with Quick Wins

Ways that SpearMC is Guiding Customers…

PeopleTools 8.58 Kibana Workshop

Scheduled Sessions - Use Cases for Custom Solutions:

- Charter Communications
  - – Covid Dashboard
- Department of Defense
  - – Federal Job Data (index)
- Parkview Health
  - – Grants Dashboard

Session 1 (1-2 hours)

- Review reporting challenges
- Select a Kibana Dashboard to be built
- High Level Design
- Review Kibana Setup

Session 2 (2-6 hours)

- Develop/Review SQL view
- Develop/Review query
- Develop/Review Elasticsearch Index
- Deploy & Schedule Index
- Create Index Pattern in Kibana

Session 3 (4-8 hours)

- Iterative Sessions
  - Build up to 7 Kibana Visualizations
  - Build 2 Kibana Dashboards (1 tile and 1 full)
- Recommendations for additional features and future enhancements

Session 4 (1-2 hours)

- Import Kibana Dashboards into PeopleSoft
- Apply Security and assign to roles

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Where is the Value for Customers…

Flexibility in the Solution

Where is the Value for Customers…

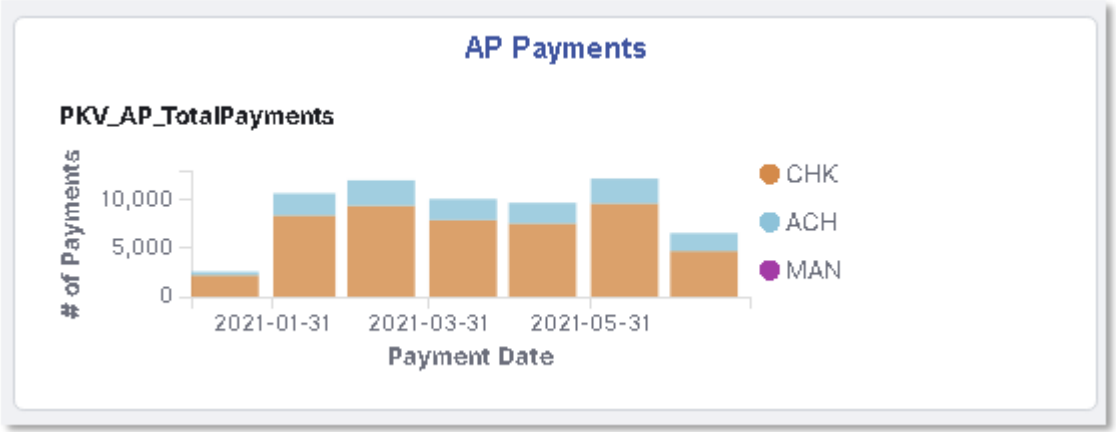
- ❑ Utilize Delivered Dashboards
- ❑ Clone and Modify Delivered Dashboards
- ❑ Utilize Delivered Elastic Indexes, Create Custom Dashboards
- ❑ Clone and Modify Delivered Elastic Indexes, Create Custom Dashboards
- ❑ Custom Elastic Indexes and Custom Dashboards

Landing and Expanding

Where is the Value for Customers…

Parkview Health

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



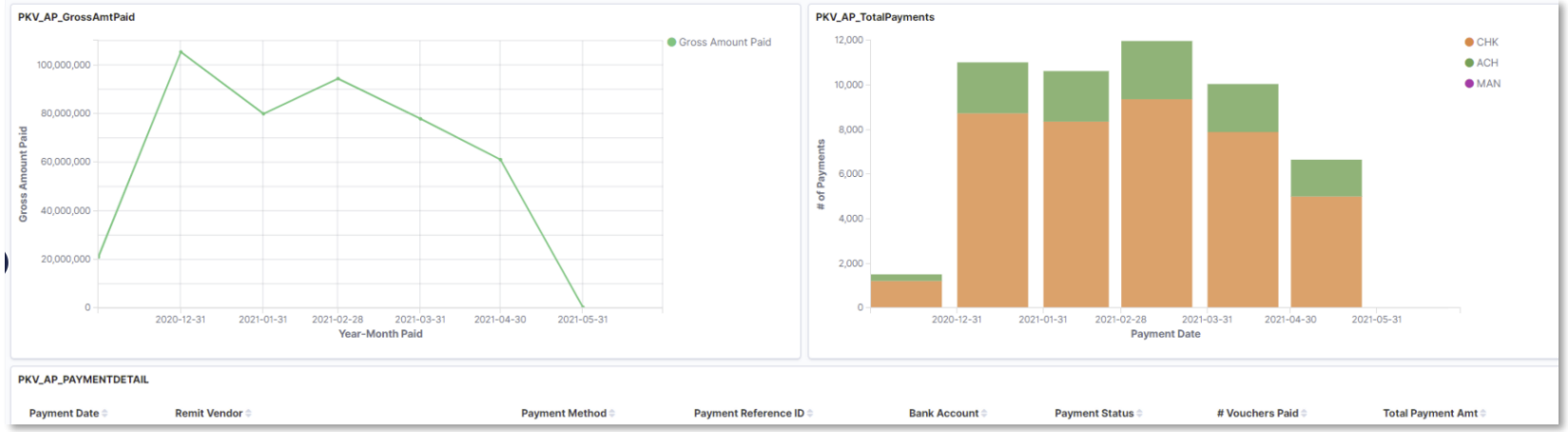
PARKVIEW HEALTH

Leveraging Delivered Content

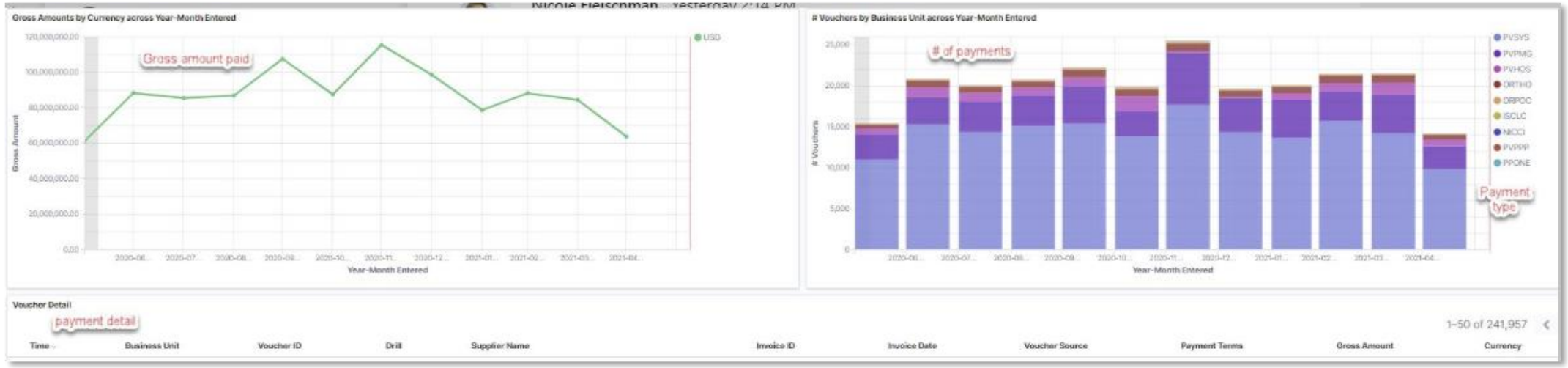
Where is the Value for Customers…

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.



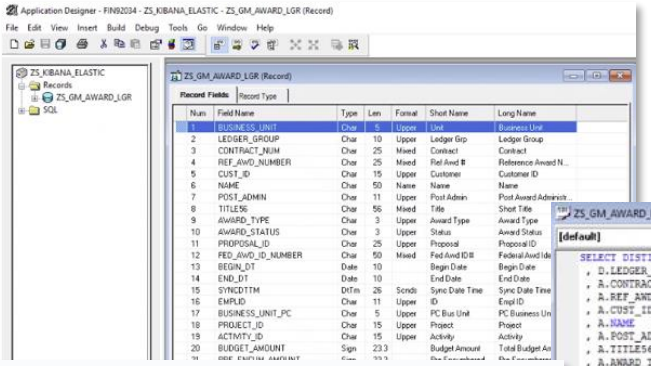
Can we do something similar but with payments? I do like the option of knowing what type of payments if that can be added to the total payments chart (like business units are there now)

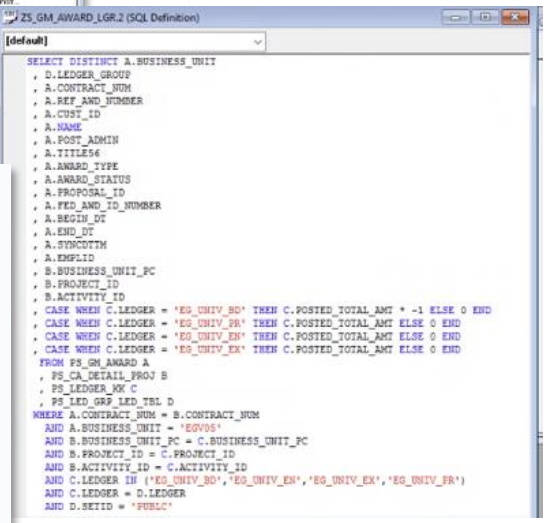


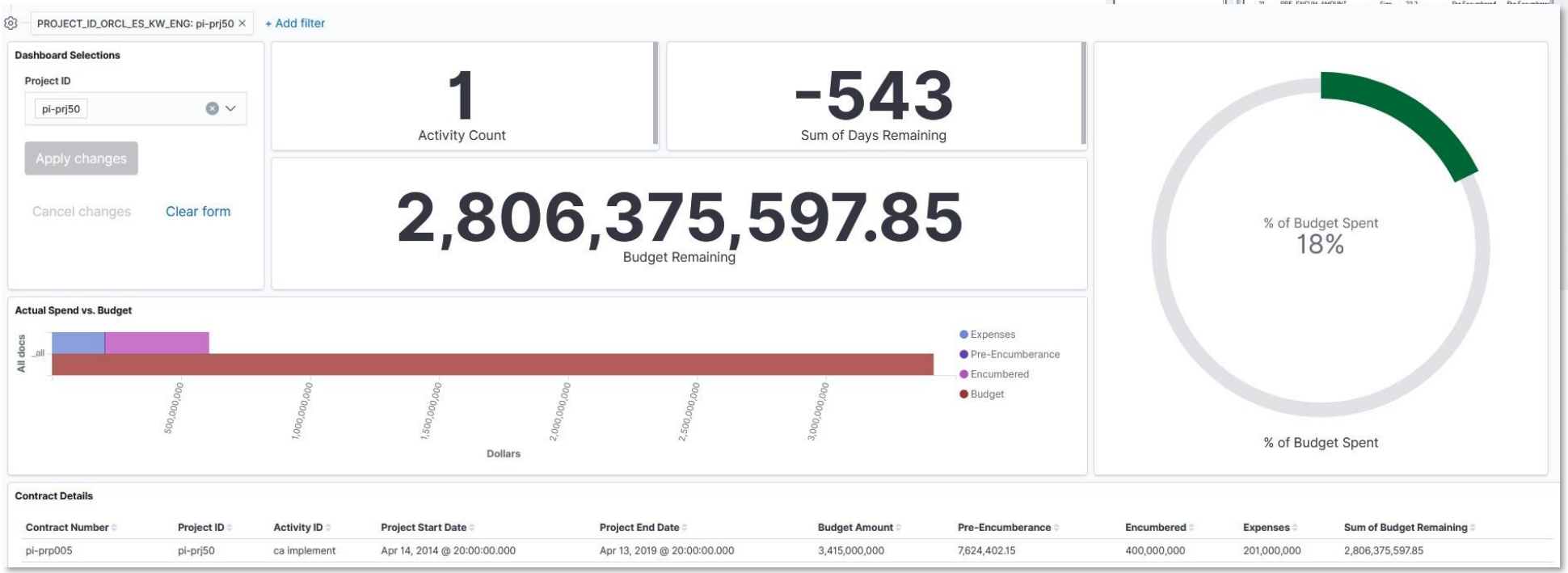
Custom Grant Solution

Where is the Value for Customers…

Create a Dashboard that summarizes Grant funding **B**reakdown by Budget Remaining, Expenses, Pre-Encumberance & Encumbered

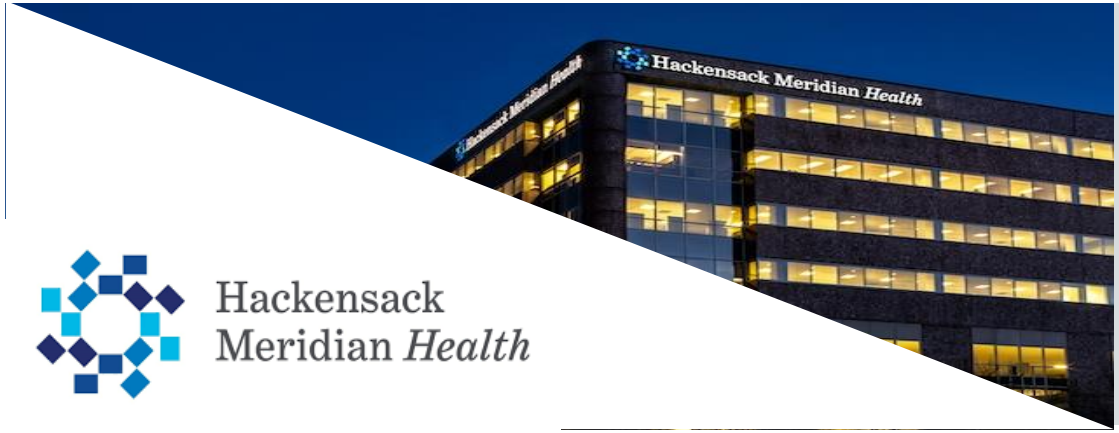






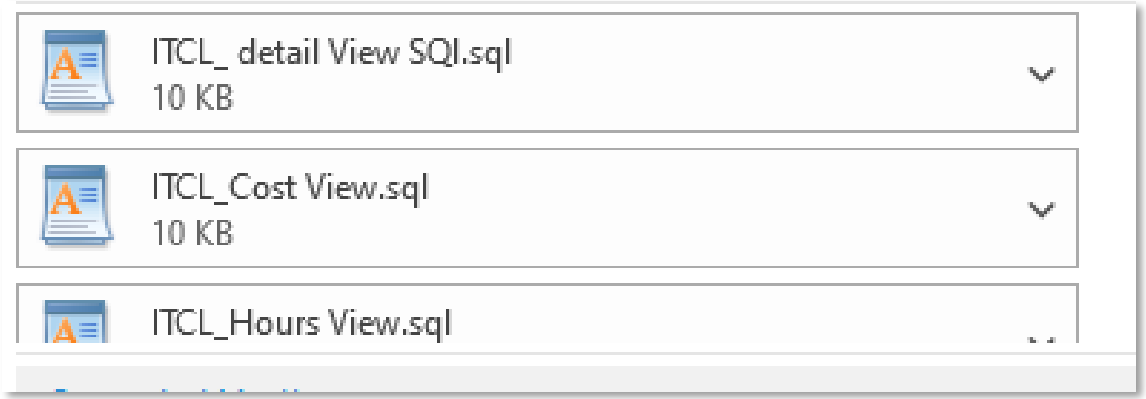
Enhancing Experience with Embedded Dashboards

Where is the Value for Customers…



Hackensack Meridian Health

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



Enhancing Experience with Embedded Dashboards

Where is the Value for Customers…

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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)

	March 2021		February 2021		Increase / Decrease	
Manager	Total Hours	Capital Hours	Total Hours	Capital Hours	Total Hours	Capital Hours
Abichandani,Prem P	0	0	0	0	0	0
Ahluwalia,Kawaljit S	1264	0	0	0	1264	0
Baclit,Teresa C	0	0	0	0	0	0
Barbee,Rodney F	0	0	0	0	0	0
Belko,Kathleen	0	0	0	0	0	0
Benson,Brian J	0	0	0	0	0	0
Blaney,Patricia	0	0	0	0	0	0
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

Example Drilldown

CC#	Department	Manager	Name	Empl ID	Project on Time Report	Project Name
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Simon,Heidi Ann	1015576	ITCL_2021_011	Other IT Operating Projec
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Rongione,Francel	1015570	ITCL_2021_011	Other IT Operating Projec
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Morgan,Barbette	1015572	ITCL_2021_002	Security Remediation
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Lewis,Eugene	1015578	ITCL_2021_011	Other IT Operating Projec
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Dopko,Christoph	1015571	ITCL_2021_011	Other IT Operating Projec
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Cullari,Gregory	1015574	ITCL_2021_011	Other IT Operating Projec
1008476	IT - Business Applicatic	Ahluwalia,Kawaljit S	Castor,Maureen	1015575	ITCL_2021_002	Security Remediation

Create a Fully Custom Cost of Labor Report

Formal spec with data requirements – various SQL views

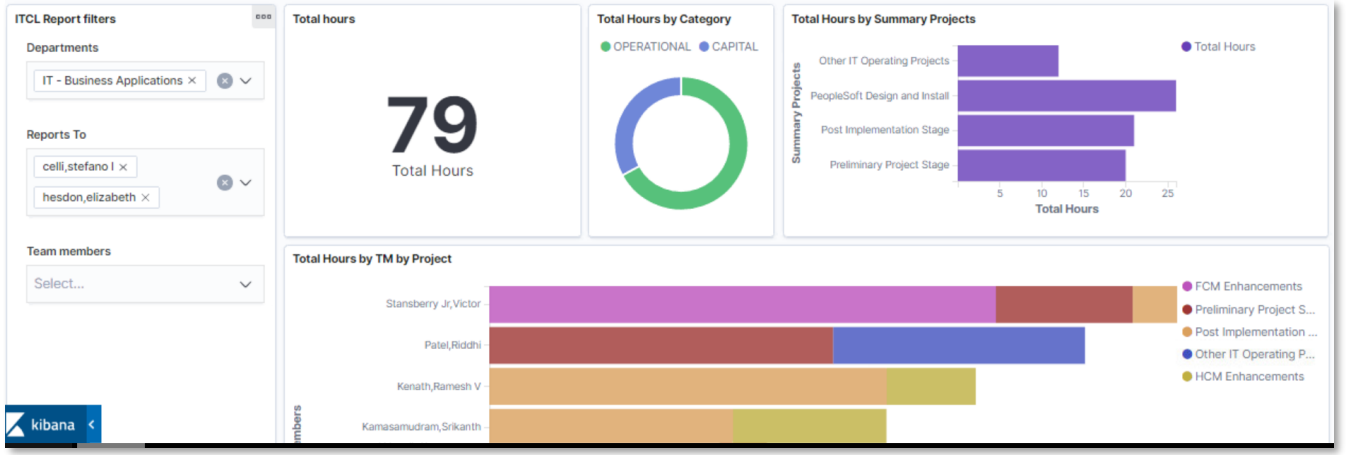
- Intro to Kibana
- Requirements Deep Dive
- Create a combined SQL View
- Build Elastic Index
- Create in Kibana
- Access Secured by Role in PeopleSoft

Curated Dashboards

Where is the Value for Customers…

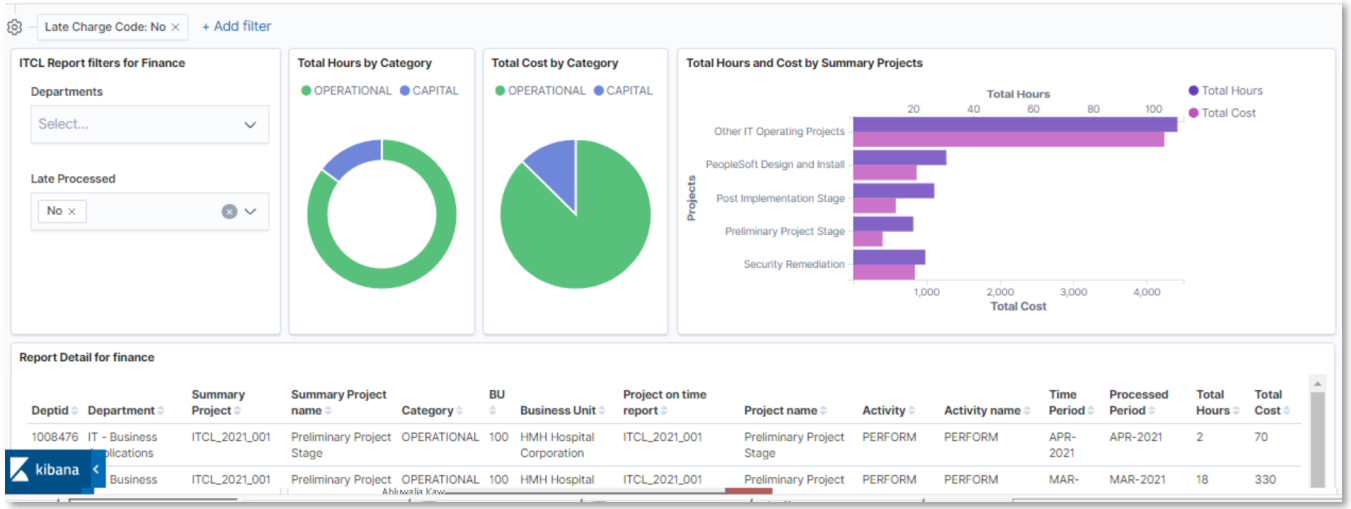
Project Labor Report (For managers)

- 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



IT Labor cost by Dept. (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

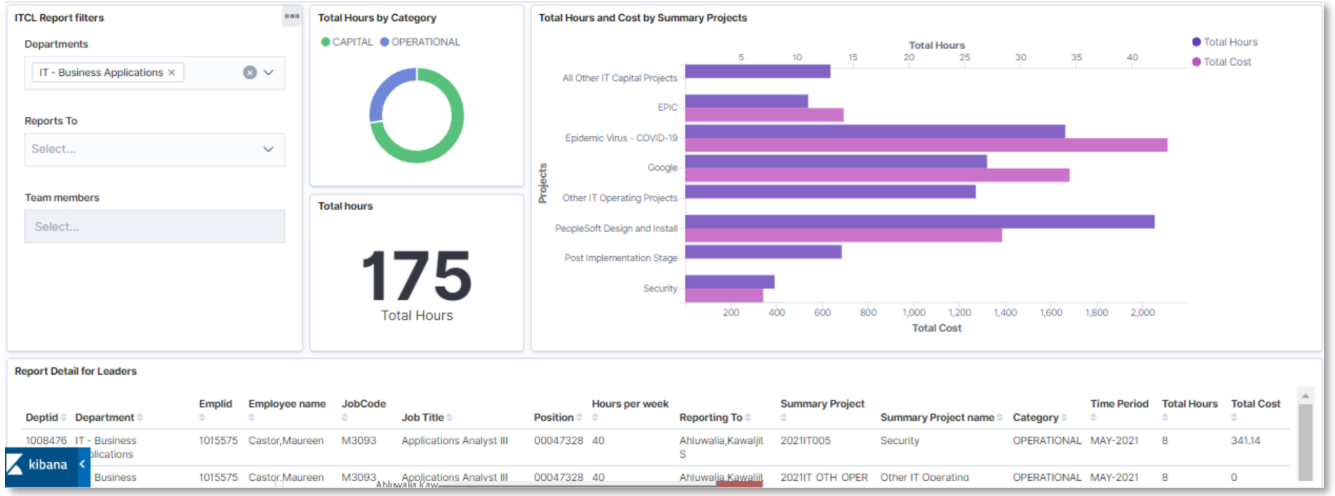


Curated Dashboards (cont.)

Where is the Value for Customers…

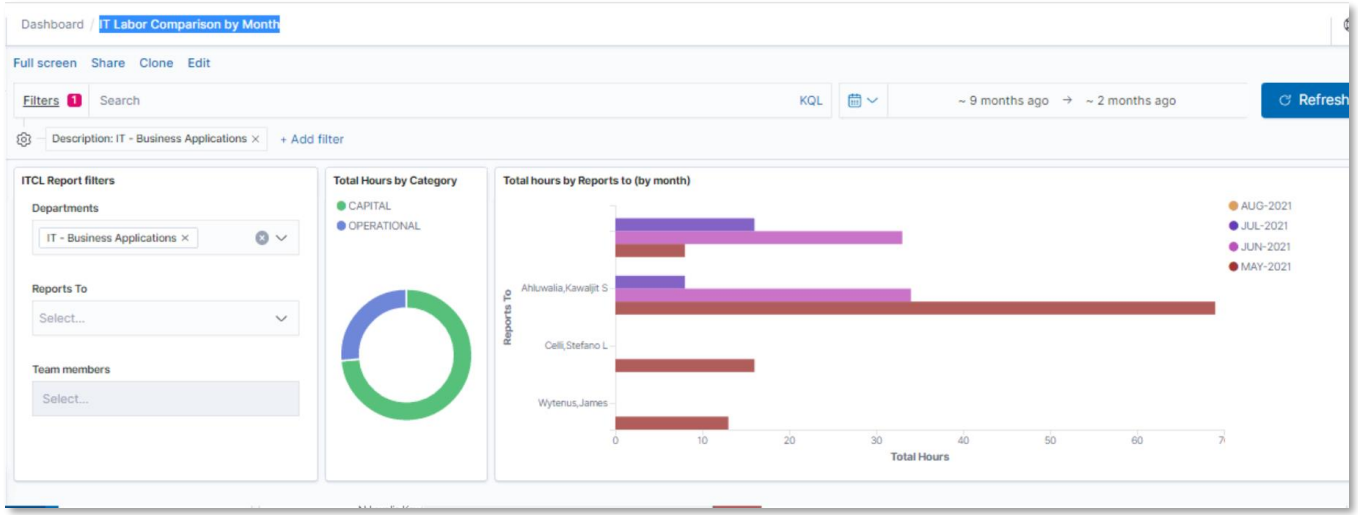
IT Labor report (For IT leaders)

- 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



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)



Catalyst for Upgrade

Where is the Value for Customers…

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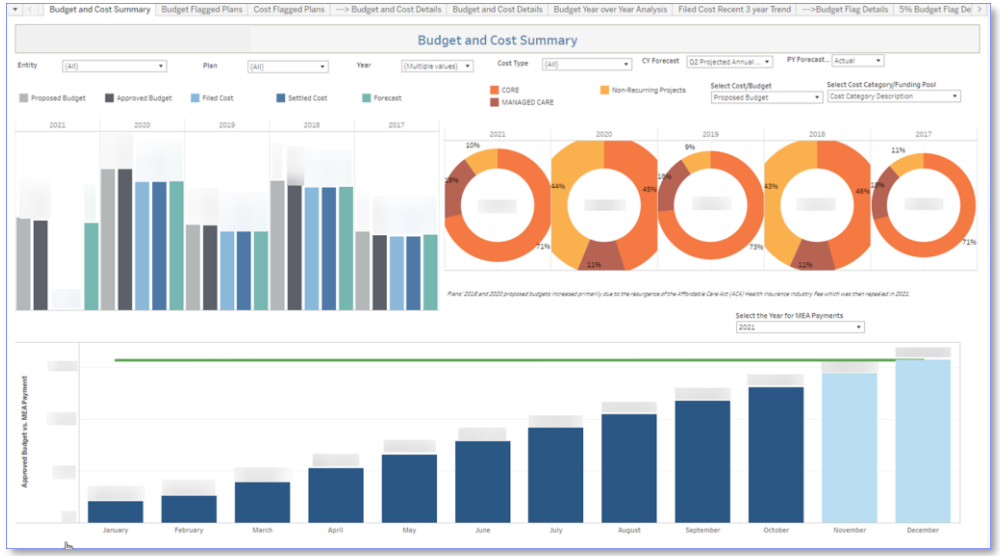
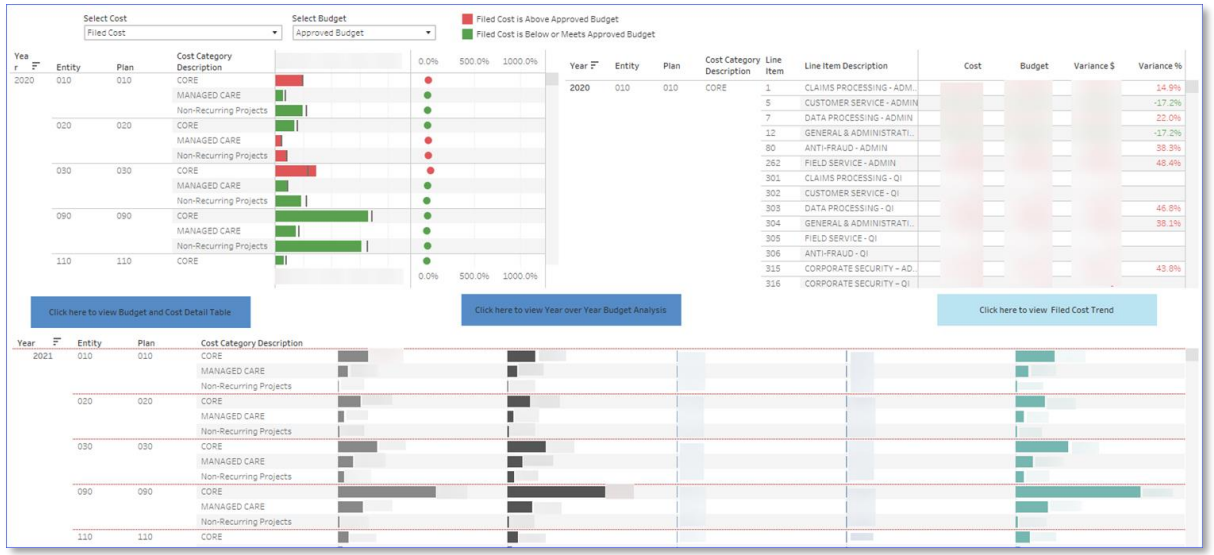
BlueCross BlueShield

Blue Cross Blue Shield Association

- Environment:
  - Financials 9.2 PUM 22
  - PeopleTools 8.57
- Asked for Demo
  - Want to compare with current work in Tableau





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Improving the Customer Experience

ORACLE Partner
Expertise in PeopleSoft in North America
Expertise in Oracle Cloud Platform in North America
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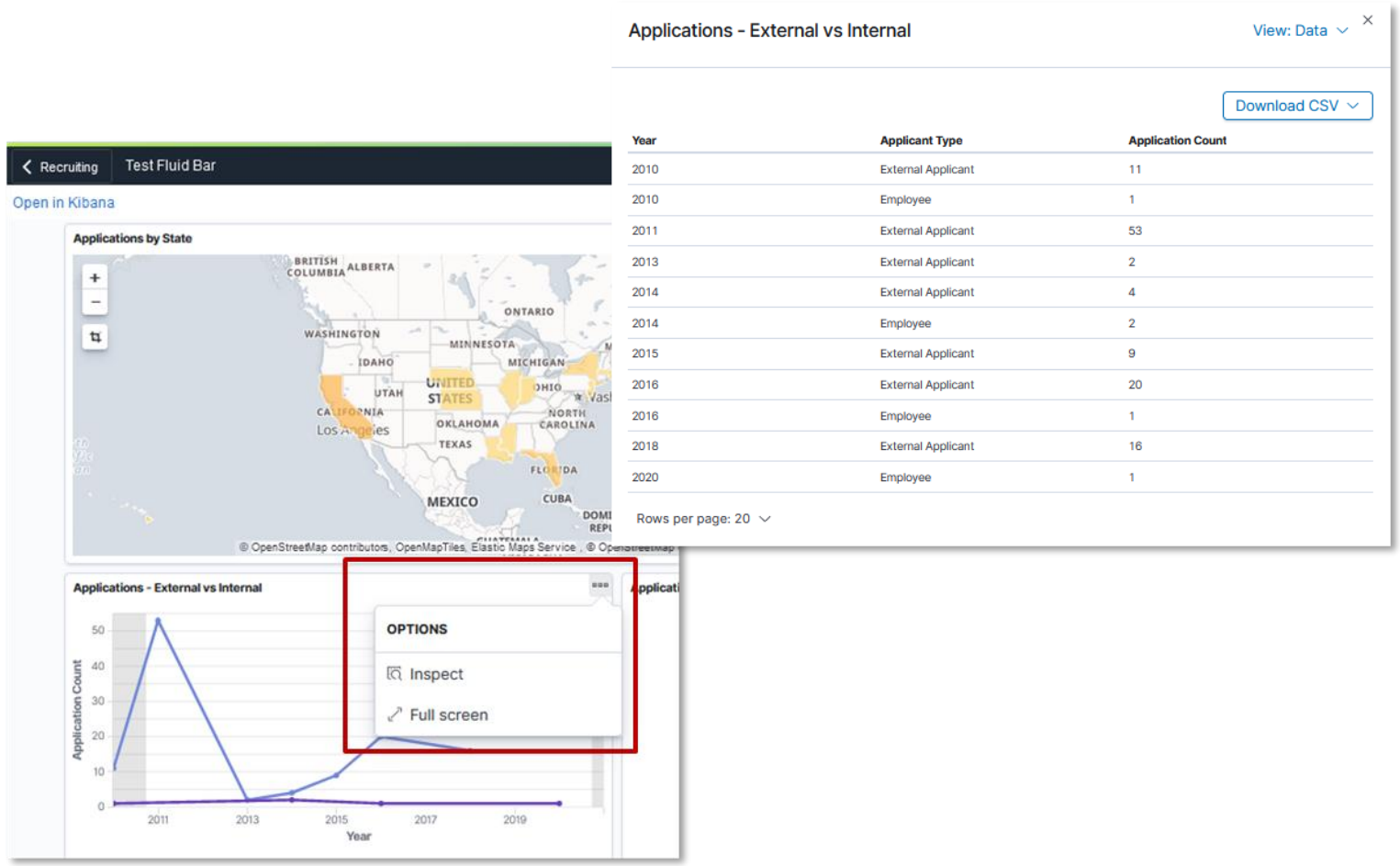
Gartner Recognized Vendor

Limited Excel Capabilities

Improving the Customer Experience…

- While on a Kibana dashboard in PeopleSoft, hover over a visualization and click the … in the upper right, then select Inspect

- This only works for Visualizations – Saved searches (data sets saved via Discover) will not have an option to download to Excel even when on a Dashboard



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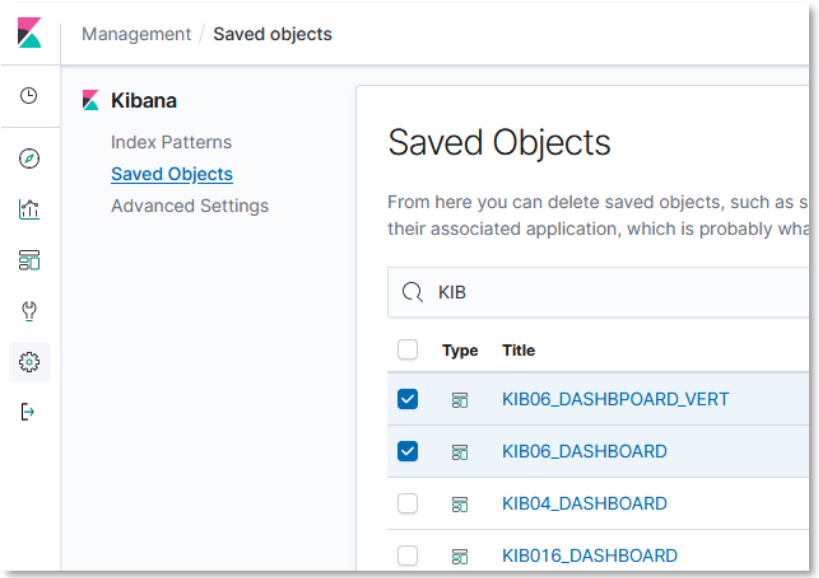
Catalog Cleanup

Improving the Customer Experience…

- In PeopleSoft
  - Delete from Kibana Privileges
    - PeopleTools > Search Framework > Administration > Kibana Privileges
  - Delete from Kibana Visualizations
    - PeopleTools > Search Framework > Administration > Kibana Visualizations
  - Delete from Import Kibana Visualizations
    - PeopleTools > Search Framework > Administration > Import Kibana Dashboards
  - Verify that content is gone from Deploy Kibana Dashboards Tab
    - PeopleTools > Search Framework > Administration > Deploy Kibana Dashboard
- In Kibana
  - Delete from Saved Objects
    - Management > Saved Objects (Delete)



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Great Features

Improving the Customer Experience…

- The integration between Kibana and PeopleSoft
- Performance of Dashboards
- Learning Curve
- 8.59 Enhancements
  - Real Time Data
  - External Data

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Questions or Comments…

Stay In Touch!

GARY DRANIKOSKI

Director, Managed Services & Analytics

gary.dranikoski@spearmc.com
(724) 448-1614