Techno-Functional Course

Agenda

PeopleSoft Insights with OpenSearch Technologies

2-Day Course

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PeopleSoft Insights with OpenSearch Technologies

This two-day course provides hands-on training of PeopleSoft Search Framework and Insights, utilizing OpenSearch and OpenSearch Dashboards. Participants will gain practical experience with everything from installation and configuration of the PeopleSoft Search Framework to creating analytical reports and dashboards.

Designed for HCM, FSCM, and Campus Solutions techno-functional users, this course covers foundational concepts like deploying search definitions and building search indexes. Students will also dive into OpenSearch Dashboards (formerly Kibana) and the creation of PeopleSoft Insights Analytics, gaining the skills needed to create and manage PeopleSoft search and Analytical reporting solutions.

Installing OpenSearch and Configuring PeopleSoft Search Framework

- Explaining the Features of PeopleSoft Search
- Describing the PeopleSoft Search Framework
- Describing OpenSearch
- Installing OpenSearch (using DPK)

Deploying Search Definitions and Building Search Indexes

- Creating a Search Instance (using ACM template)
- Locating Delivered Search Definitions
- Deploying Search Definitions and Search Categories
- Building Search Indexes.
- Deploying and Indexing Data
- Working with Incremental Index Updates
- Working with Search Categories

Configuring End User Search Options

- Working with Search Framework Search Results
- Enabling Global Search
- Enabling Keyword Search

Additional Features

- Pivot Grid real-time data

OpenSearch Dashboards

- Index Pattern
- Scripted Fields
- Discover and Visualize
- Aggregations
- Create a Dashboard

Import Dashboards into PeopleSoft

- Enable PeopleSoft Insights Dashboards
- Import Dashboards into PeopleSoft
- Configure the Visualization
- Deploy the Dashboard
- Add to PeopleSoft Page

Security

- PeopleSoft permissions
- Search definition security
- Search security framework
- Assign Role Access to Dashboard

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PeopleSoft Insights with OpenSearch Technologies

Overview of OpenSearch Dashboard and PeopleSoft

- Reporting Overview
- Evolution of Search and Dashboard Products with PeopleSoft/PeopleTools

OpenSearch Configuration

- Configuration
- Deploy the Search Definitions
- Setting up Monitoring Servers
- Deploy the Dashboards
- PeopleSoft Insights
- Verifying Integration
- PeopleTools Roles Provided for Search Framework

Search Definitions

- Delivered Search Definitions
- What does the search engine do?
- Search Framework
- Search Definition Queries
- Search Designer
- Search Categories
- Deploy Search Definitions
- Deploy Search Categories
- Build Search Indexes
- Real Time Indexing

OpenSearch Dashboards

- Index Pattern
- Scripted Fields
- Discover and Visualize
- Aggregations
- Create a Dashboard
- Import Dashboards into PeopleSoft

Import Dashboard

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Appendix A

- Security

Appendix B

Tips and Tricks

Recommended Courses

- BI Publisher
- PeopleSoft Query Advanced
- Oracle SQL & SQR for PeopleSoft