Agenda

OpenSearch Dashboards

1-Day Course

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OpenSearch Dashboards

This one-day PeopleTools OpenSearch Dashboards course (including hands on activities) introduces functional and technical participants to concepts required to implement and use OpenSearch Dashboards with PeopleSoft 9.2 application data. This course applies to HCM, FSCM, and Campus Solutions users.

Students will learn about the foundational elements of OpenSearch Dashboards. Time will be spent in both PeopleTools (Search Framework and Dashboard Configuration) and in OpenSearch Dashboards, where students will learn how to create and deploy various visualizations and dashboards.

Prerequisites:

- Basic understanding of PeopleSoft Reporting

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

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

Appendix A

- Security

Appendix B

- Tips and Tricks

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