PeopleTools

PeopleSoft Search and PeopleSoft Fluid

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Program Agenda

1. PeopleSoft Search
   - Recent Highlights
   - Roadmap
2. PeopleSoft Fluid
   - Recent Highlights
   - Roadmap

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1 PeopleSoft Search

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Recent Highlights

Roadmap

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PeopleSoft Search

Powered by Elasticsearch

- Easy Elasticsearch Deployment using DPK
- Scalable Elasticsearch System Architecture
- High Availability and Disaster Recovery Capability
- Live-Cutover to support instant switch over from SES
- Increased Performance in PeopleSoft Indexing — New
- Increased Fault Tolerance in PeopleSoft Indexing — New
- Upgrade Elasticsearch — Upcoming

Elasticsearch is supported from PeopleTools 8.55.11 onwards
Elasticsearch is the only Search Engine from PeopleTools 8.56
SES End of Life – April 2018

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Elasticsearch - Demo

PeopleSoft PeopleTools Elasticsearch Home Page | Elasticsearch on PeopleTools 8.56 | Elasticsearch on PeopleTools 8.55 | Troubleshooting and Known Issues

Search This Document | Print

PeopleSoft PeopleTools Elasticsearch Home Page

Welcome
- About PeopleSoft Search Framework and Elasticsearch
- Elasticsearch Support
- Requirements
- Learn More About PeopleSoft and Elasticsearch
- Elasticsearch videos

PeopleTools Elasticsearch Home Page

Beginning with PeopleTools 8.55.11, customers can now use Elasticsearch which can be configured with PeopleSoft Search Framework.

About PeopleSoft Search Framework and Elasticsearch

Beginning with PeopleTools 8.55.11, PeopleSoft Search Framework adds support for a new search engine, Elasticsearch 2.3.2.

With the integration of Elasticsearch, PeopleSoft Search Framework builds on the existing search functionality features, and adds new features to enhance the end user experience. While the processes of creating queries, creating search definitions and categories, deploying search definitions and categories, and viewing search results, which you are familiar with, are not changed in the PeopleSoft implementation of Elasticsearch, Search Framework has enhanced the process of crawling, processing attachments, and indexing data.

PeopleTools 8.55.19 and 8.56.04 releases feature the Full DirectTransfer technology to transfer search data directly to the Elasticsearch search engine. Using the DirectTransfer mode, both search documents with attachments and without attachments are transferred to Elasticsearch server directly bypassing the Integration Gateway. These releases also provide enhanced memory management during the indexing process, enhanced exception handling for DirectTransfer, and improved performance during indexing and search time.

Also, please note the following:

- DirectTransfer is already in use from PeopleSoft 8.55.17 and 8.56 GA for documents with attachments. From 8.55.19 and 8.56.04, even documents without attachments will be sent through DirectTransfer making it Full DirectTransfer.
- The default configuration for Full DirectTransfer takes care of most of the customer scenarios for indexing speed and performance. Customers may perform a few additional configurations based on their requirements, for example, changing the number of Direct Transfer Handles, which is explained in the PeopleBooks.
- For customers using SSL, please refer to the PeopleBooks for additional configurations needed on the Process Scheduler server for SSL.

Note: To install Elasticsearch on PeopleTools 8.55.19 and 8.56.04, the minimum supported DPK version is DPK04 (DPK version 4).

This homepage provides all of the information you need to implement Elasticsearch within PeopleSoft Search Framework. Here you will find:

- Elasticsearch Installation documentation
- Instructions to move your existing Oracle Secure Enterprise Search (SES) to Elasticsearch
- Implementation documentation for PeopleSoft Search Framework, including Elasticsearch
- Links to PeopleSoft Application updates and fixes required for implementing Elasticsearch
- Troubleshooting and support documentation to assist with the installation and implementation

For additional information about the move to Elasticsearch, see: Tech Update - Oracle Finds a New Search Engine for PeopleSoft.

SES and Verity Notice

Oracle recommends upgrading to the latest PeopleTools release. See the Lifetime Support Summary for PeopleSoft Releases (Doc ID: 1348959.1).

SES

SES is supported in PeopleTools 8.54 and 8.55 only until April 30, 2018.

When upgrading to PeopleTools 8.56, consider the recommendations listed below.

Currently on PeopleTools 8.53 or earlier PeopleTools release:

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Roadmap

Note: If you are planning on going live in 2017, we recommend you move to PeopleTools 8.55.19
There are many fixes in that patch.

PeopleTools	8.54	8.55	8.56	8.57
Search Engines	Verity 6.5.x SES 11.2.2.2	Verity 6.5.x SES 11.2.2.2 ES 2.3.x	ES 2.3.x	*ES 5.4.x*
PTSF Features	Declarative Search Definition	Live Cutover Direct Transfer	Handling Large Volume	Scope TBD
Applications	9.1 w Verity 9.2 w SES	9.1 w Verity 9.2 w SES 9.2 w ES	9.1 (no search) 9.2 w ES	9.2 w ES

SES End of Life: ***Apr 30, 2018*** for all PeopleTools releases

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Latest Enhancements

- Attachment processing (Elasticsearch Interact)
- Large sized documents and large volume
- Working around ES temporary failures
- Indexing issues for document types (or in general parsing errors)
- Search performance
- Accented characters
- genfeed issues (hang, crash, out of mem etc...)
- Special characters
- Facet related issues

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Some Potential Enhancements

For End Users

- Autocomplete (as users type, possible results are displayed)
- Classifying attributes (results may appear in different categories, enabling users to choose the correct item)
- Adding free text dynamic filters/facets
- Social search and ranking of results (users rank value of results)
- Visualization of search results (previews, frequently visited items)
- Tagging results (users can enter tags or navigate to related results from tags)

Elasticsearch 5.x is on the way

For Administrators

- Near Real-Time log monitoring/analysis
- Combining Metrics and logs – A holistic way of analyzing logs

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Multiple Facet Values during Search

Select Human Resources, Lab Facility, Finance and Administration in Department
Results from all the three values are aggregated in Search Results

My Homepage | Search Results

New Search

Department

- Human Resources (316)
- Lab Facility (26)
- Finance and Administration (6)
- None (3)
- Administration (1)
- Corporate (1)
- Hotel Services EMEA (1)
- Information Systems (1)
- Quality Assurance (1)

My Association

- Team Member (346)
- Primary Recruiter (2)
- Recruiter (2)
- Hiring Manager (1)

View Search Results

348 results for keyword: "Team"

Human Resources ⊗ | Lab Facility ⊗ | Finance and Administration ⊗ | Clear All

50 rows

30003
Manager-Compensation/Benefits,Corporation Headquarters,New York,NY

10279
Sr Payroll Clerk(Interview),Delaware Operations,Wilmington,DE

600035
Laboratory Technologist I - Reference 60002 (Fed Monthly),Corporation Headquarters,New York,NY

600031
Laboratory Technologist I - Reference 60002 (Fed Monthly),Corporation Headquarters,New York,NY

600027
Laboratory Technologist I - Reference 60002 (Fed Monthly),Corporation Headquarters,New York,NY

500273
Administrative Assistant,Corporation Headquarters,New York,NY

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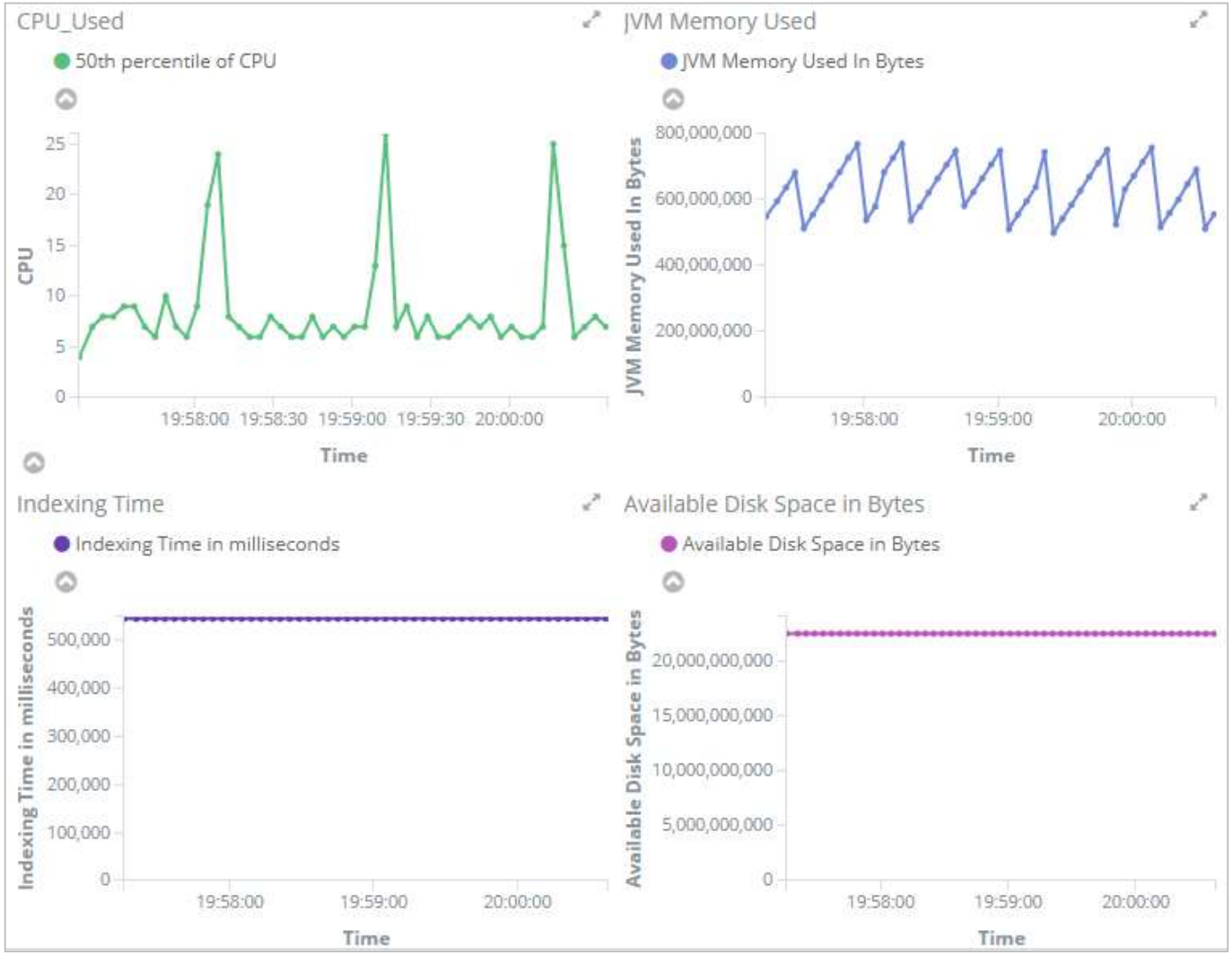
Elasticsearch System Health Monitoring Administrators can fully Visualize System Metrics



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Visualize PeopleSoft Indexing to Elasticsearch Administrators can fully Visualize Index Metrics

Index Size

5.561MB

Min primaries.store.size_in_bytes

Total Search Queries

540

Max total_search_queries

Indexed Documents

Total Documents

Segment Detailed Stats

Segment Info	Document Count	Attachment Count
segment1	252	34
segment2	234	29
segment3	7	0

Segment Stats

Index Size Over Time

Indexing Rate

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Use Case : Second Level Security Authorization

- Business requirement is to introduce additional security during updating of sensitive data
- We need to send a One Time Password to the user's registered mobile number

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PeopleSoft Extensibility - Event Mapping Demo

Employee Self Service

Manage Related Content for Content References

VP1 ps

Content References | Pivot Grids | MAP Layouts | Event Mapping

Manage Related Content for Content References

Related Content services are assigned to the following application pages

Search | Search

Content References Find | View 100 | First 1-20 of 209 Last

	Content Reference	Edit	Remove
1	Fluid Structure Content > Fluid Pages > Inventory Cost Balancing > Accounting Line Errors	Edit	Remove
2	Fluid Structure Content > Fluid Pages > Inventory Cost Balancing > Accounting Lines Not Created	Edit	Remove
3	Fluid Structure Content > Fluid Pages > Inventory Cost Balancing > Accounting Not Posted to GL	Edit	Remove
4	Fluid Structure Content > Fluid Pages > Inventory Cost Balancing > Accrued Liability Difference	Edit	Remove
5	Procurement Contracts > Add/Update Contracts	Edit	Remove
6	Purchasing > Purchase Orders > Add/Update Express POs	Edit	Remove
7	Purchasing > Purchase Orders > Add/Update POs	Edit	Remove
8	Purchasing > Receipts > Add/Update Receipts	Edit	Remove
9	Purchasing > Requisitions > Add/Update Requisitions	Edit	Remove
10	PeopleTools > Health Center > Alerts	Edit	Remove
11	Lease Administration > Hidden Components > Amend Lease	Edit	Remove
12	Customer Contracts > Determine Price and Terms > Amendment Amount Allocation	Edit	Remove
13	General Ledger > Journals > Pre-Amortization Journals > Amortization Schedule	Edit	Remove
14	Customer Contracts > Determine Price and Terms > Amount Allocation	Edit	Remove
15	Portal Objects > Pagelets > Real Time Bottom Line > Analysis 1	Edit	Remove
16	Portal Objects > Pagelets > Real Time Bottom Line >	Edit	Remove

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Setup and Configuration

Define Related Content Service

Service Information

Service ID: BG_PD_POSTSAVE
Object Owner ID:
*Service Name: BG_PD_POSTSAVE
Description:
Bulk Action
Template
*URL Type: Application Class
Write help text
Copy Service Definition

URL Information

Application Class Parameters

Package: BOEING_CUSTOM_POS
Path:
Class Name: BG_PD_SAVEPREC

Manage Related Content for Content References

Related Content services are assigned to the following application pages:

Search: Search

Content References — Find | View All | First 1-3 of 3 Last

	Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position	Edit	Remove
1	Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position	Edit	Remove
2	Workforce Administration > Job Information > Job Data	Edit	Remove
3	Stock > Grants > Maintain Grants	Edit	Remove

Assign Related Content to an Application Page

Create a New Related Content Service

Event Mapping

Assign Related Content

Assign content to be displayed within the Related Content Frame. Use the Configure link to define the parameter mappings and security settings for the service.

Content Reference: Add/Update Position Info

Component Level Related Content

Assign Component Level Related Content to be added to the Related Content menu

Personalize | Find | View All | First 1-3 of 3 Last

General | Instance Information

Enable	Event Name	Select	Service ID	Processing Sequence
☑				
☑	Post Build		BG_CST_PD_PB	Post Process
☑	Save Post Change		BG_PD_POSTSAVE	Post Process

Component Record Level Related Content

Assign Page Level Related Content to be added to a field level contextual menu

Personalize | Find | View All | First 1 of 1 Last

General | Instance Information

Enable	Record (Table) Name	Select	Service ID	Processing Sequence
☑				

Return to Manage Related Content Configuration page

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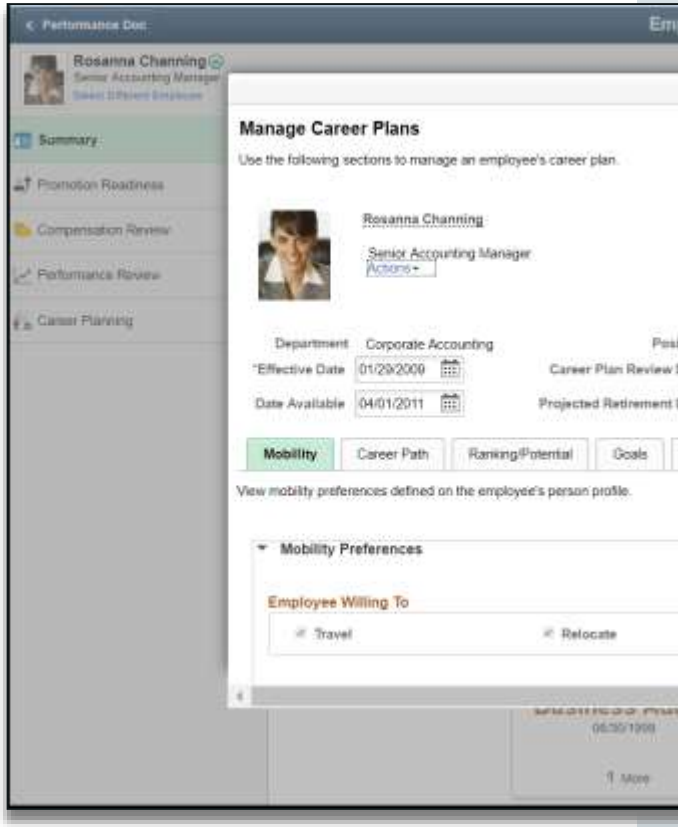
Why Classic Plus?

- Harmonize the user experience: seamless, modern look and feel
- Enabled by Tools 8.56; Apps pages delivered on by default
  - Planned: HCM 24 (Oct 2017), FSCM 26 (Dec 2017)
  - Some Classic pages will not be converted, list to be provided
- Recommendation: Take Classic Plus with next 'Make Me Current'
  - Can be turned off at the database or component level

PLANNED FEATURES AND ENHANCEMENTS

FOCUS GROUPS



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Classic Plus – Fluid like Theme Demo

Branding System Options

Work Order

Work Order | Requirements | Schedules | Actuals | Cost | Miscellaneous

Work Order CB

*Description Circuit Breaker Closing Spring is charged, but Circuit Breaker will not Close

177 characters remaining

Created On 12/17/2012 10:56AM By Theresa Monroe

Required Start 12/17/2012 End 12/17/2012

WO Duration 5.00 Hours

WO Status Created As of 12/17/2012

Approval Status Approved

*WO Type Corrective Maintenance

Service Unit

*Priority High

Service Request

*Shop SHOP A Shop A

Notes Attachments Supplemental Data

Asset Unit US001 US001 NEW YORK OPERATIONS

Asset Location US001 USA - New York

Asset ID EX_000000283 Equipment

Area ID

Asset Details Job Templates Work Order History

Asset Maint. History Asset Oper Info

Asset Criticality 02 Medium

Work Order Tasks

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Classic Plus

- Outcome of the Dual Switches

Branding System Options	Component Level Switch	PIA Rendering
Any non fluid like	Off	Classic
Any non fluid like	On	Classic
Fluid like theme for Classic	Off	Classic
Fluid like theme for Classic	On	Classic Plus

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Fluid Activity Guides Demo

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Activity Guide – User Interface Improvements Horizontal Rendering

Exit

Promote Employee

Jill Chancelor
Director of Finance
Headquarters

1 Work and Job Information
2 Compensation Details
3 Review and Submit

Save | < Previous | Next >

Step 2 of 3: Compensation Details

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Default NA Annual			4,000.53	4,000.53	USD	Flat Amount	Monthly

48,006.36 Comp-Ratio: 1.15

33,372.00 Minimum
41,715.00 Midpoint
50,058.00 Maximum

	New Information		Current Information	
Monthly Salary	4,000.53	USD	4,000.53	USD
Annual Rate	48,000.36	USD	48,000.36	USD

Proposed Horizontal Rendering

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Activity Guide – User Interface Improvements Modal Window for Additional Information

Exit

Apply for Job

Step 1 of 8

Save as Draft | < Previous | Next >

Director of Finance

1 Sta In Progress

2 Prequalify Not Started

3 Attach Resu Not Started

4 Preferences Not Started

5 Qualification Not Started

6 Referrals Not Started

7 Diversity Not Started

8 Review & Su Not Started

Job Description

Director of Finance

Job ID	504072	Full/Part Time	Full Time
Location	Kansas City	Reg/Temp	Regular

Preferred Qualifications

The ideal candidate will possess the following qualifications:

- Three years or more experience in a management role in a procurement or related function
- Bachelors degree; Masters preferred
- Certified Purchasing Manager or related certification a plus

Job Description

The role will consist of the following responsibilities:

- Manage and direct all purchasing activities
- Assess performance indicators to ensure schedule, costs and quality goals are met
- Define and manage the procurement system
- Organize the supplier review process to ensure compliance

Proposed – Modal Window

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Other Roadmap items

User Productivity

- Application Designer
  - Display database name in title bar
  - Show full value of style path

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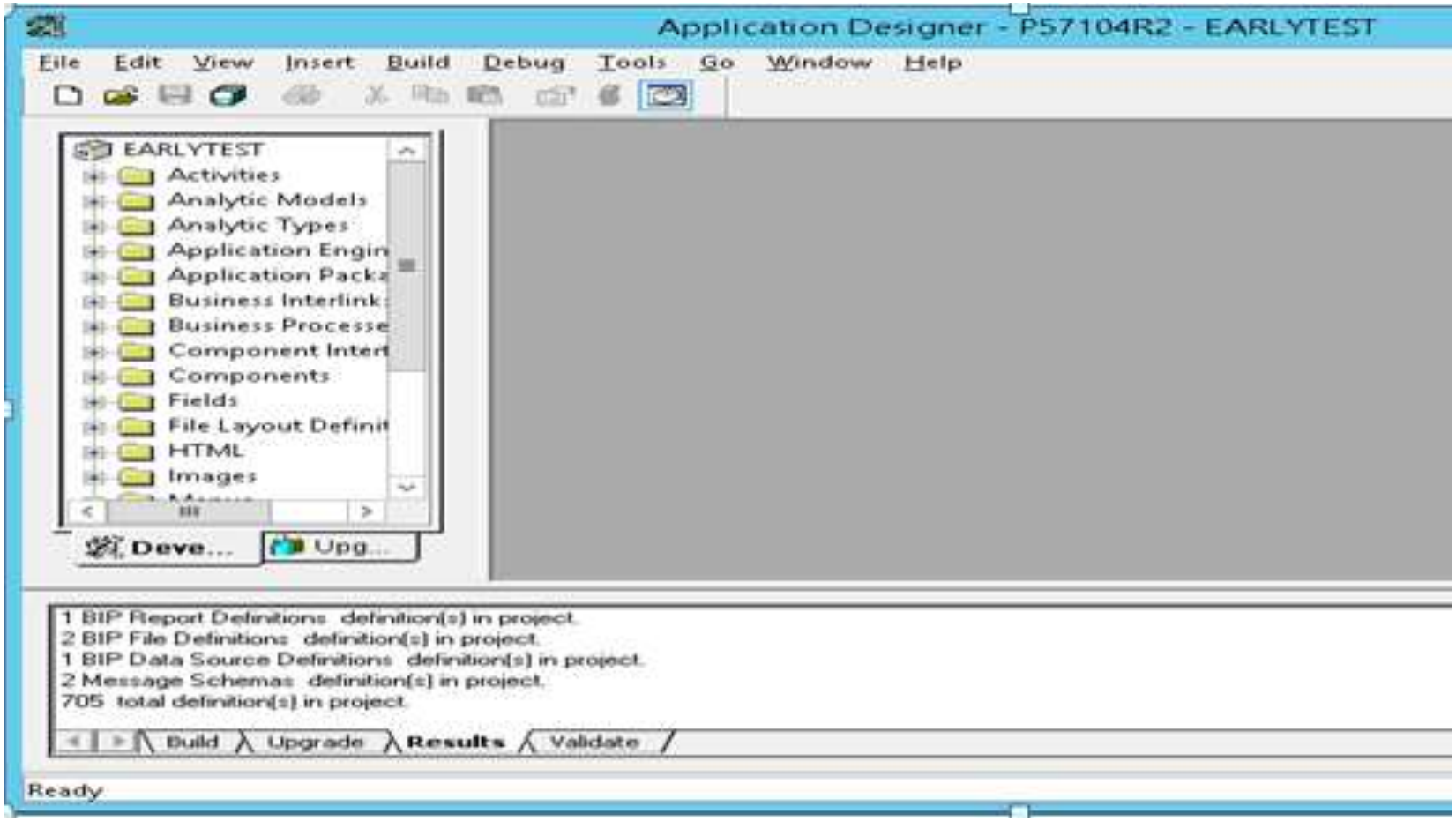
Application Designer
Display database name in title bar



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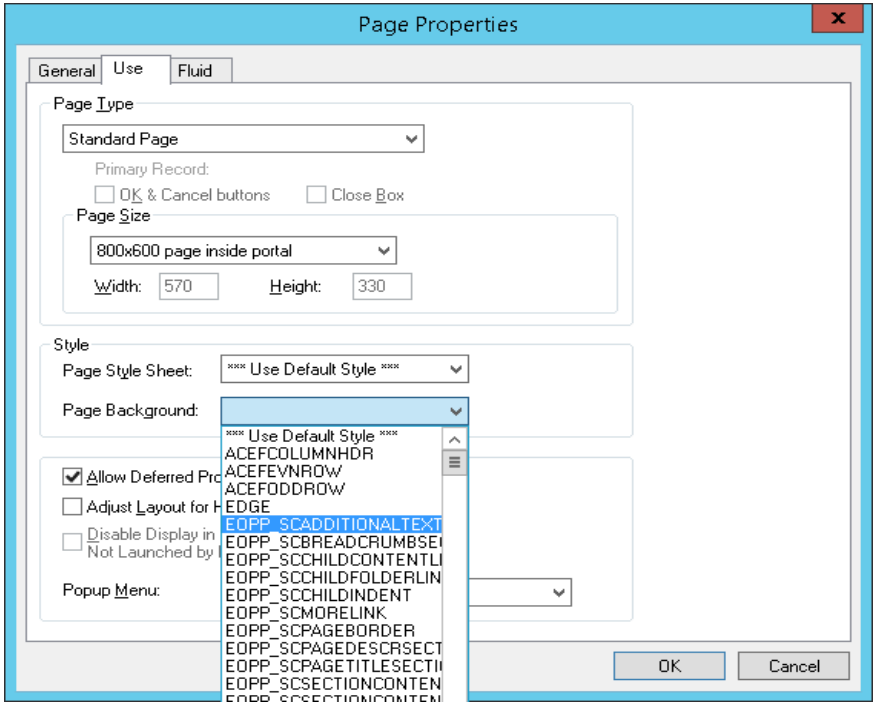
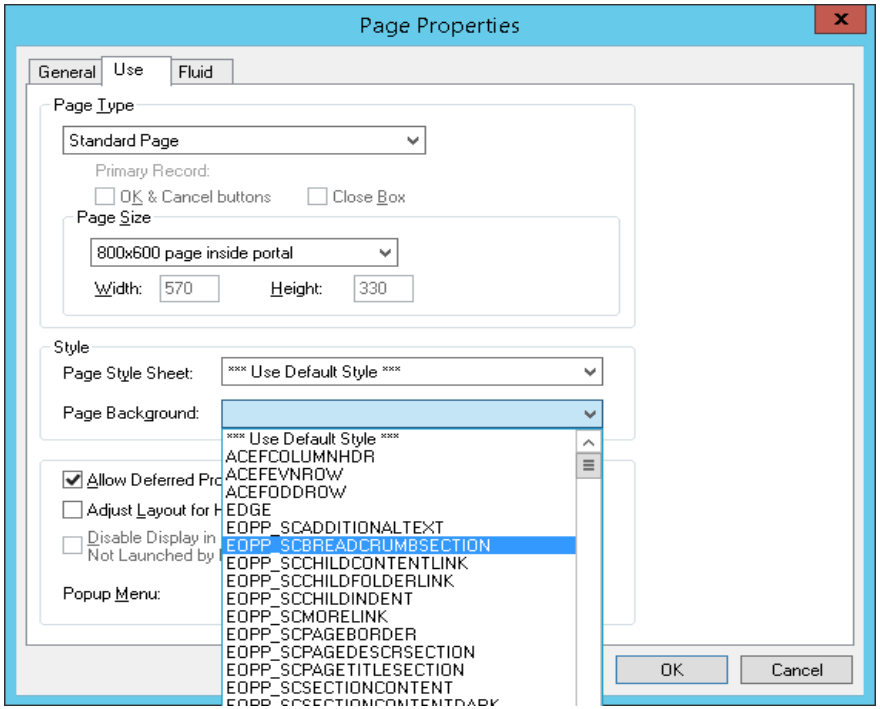
Application Designer User Interface Improvements



Current – Style Name is partially displayed



New – Style Name fully displayed

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Question and Answers

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